



CONTRACTS

User Manual

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GETTING FAMILIAR WITH THE INTERFACE

Contract Repository

Overview

The Contract Repository is a centralized contract management tool that enables collaboration and enhances contract visibility and compliance throughout your company.

It helps you automate contract life cycle management, from authoring and negotiation to termination or expiration.

Contract Elements

A contract is characterized by the following elements:

- **Contract type**
There are various types of contract: *Frame agreements* or *Project contracts*. The selected type determines the contract's composition (that is, the tabs and, therefore, the information it contains), as well as the approval workflow it is submitted to.
- **Organizational and purchase scopes**
These are the business units and the commodity segments that are involved in the contract. Connected users only see the contracts that belong to their own assigned scope.
- **Supplier**
This is the supplier who signed the contract with your company.
- **Contract milestone dates**
These are the dates that rule the contract life cycle and trigger the sending of automatic notifications.
- **Workflow and validity statuses**
The status of a contract indicates whether it is usable or not.
- **Items covered under the contract**
Frame agreements may specifically refer to catalog items.

Accessing the Contract Repository

Select the *Contracts / Browse Contracts* menu. The *Browse Contracts* page displays.

Getting Familiar with the Contract Repository Interface


The *Browse Contracts* page lists all the contracts that belong to your scope of action (business units and commodity segments you have been assigned to).

Authorized profiles have the ability to display all contracts by deselecting the option *Limit to my scope*, and then clicking the **Search** button.

	Code	Name	Supplier	Type	Study	Notification	Expiration date	Amount	Alert	Progress	Date Status	Evaluation
X	CTR000049	Contrat OFFICE DEPOT	OFFICE DEPOT	Scope of Work (buying)	2/27/2015		5/31/2015	0.00 USD		Approval in progress		
X	CTR000048	Laptop renewal plan - R&D-Horizon - Austin	Horizon - Austin	Scope of Work (buying)						Drafted		
X	CTR000045	Contrat HEWLETT PACKARD FRANCE	HEWLETT PACKARD FRANCE	Scope of Work (buying)			6/30/2015	0.00 USD	Valid contract but progress status inactive	Drafted		
X	CTR000043	Contrat cadre DELL FR	DELL FRANCE	Master Agreement (buying)			2/2/2015	100,000.00 EUR		Approval in progress		
X	CTR000042	Contrat Dell France	DELL FRANCE	Scope of Work (buying)			7/31/2015	0.00 USD	Valid contract but progress status inactive	Drafted		
X	CTR000041	Accord cadre DELL France	DELL FRANCE	Master Agreement (buying)			1/1/2015	0.00 EUR		Approval in progress		
X	CTR000034	Company X Master Agreement	Tools company	Master Agreement (buying)			1/20/2015	50,000.00 USD		Approval in progress		
X	CTR000033	Configured Laptop Rate card	Horizon - Austin	Pricing Agreements			1/31/2015	50,000.00 USD		Approval in progress		
X	CTR000032	Horizon Master Agreement	Horizon Telecom	Master Agreement (buying)			1/9/2015	100,000.00 USD		Approval in progress		

Each row in the list represents a contract. For each contract, the list displays the following information:

Column	Description
<div> <div></div> <div>(Right click on the list header row)</div> </div>	Gives access to the following features: <ul style="list-style-type: none"> <input type="checkbox"/> <i>Show/Hide columns</i>: lets you select the columns you wish to display or hide in the list <input type="checkbox"/> <i>Download in Excel format</i>: lets you download the list into MS Excel® format
<div> <div></div> <div></div> </div>	Deletes the contract (deletion only becomes effective after confirmation)
<div> <div></div> <div></div> </div>	Opens the contract
Code	Internal code automatically assigned by the system to the contract upon its creation
Contract label	Name of the contract
Designation	Name of the supplier with whom the contract has been signed
Type	Type of contract: <i>Frame agreement</i> , <i>Project contract</i> , etc.
Study date, Notification date, Expiration date	Key dates in the contract life cycle
Amount	Overall contract amount
Currency	Currency used to express monetary amounts in the contract
Alert	Alert message associated with the contract. You may search contracts based on their associated alert messages.

Column	Description
Progress	Status of the contract within its approval workflow
Date status	Validity status of the contract based on its milestone dates.
	The icon  indicates that the contract will be automatically renewed.

The **Create a contract** button lets you initiate new contracts (see p.23).

Search filters, located in the upper part of the window, help you search for and retrieve contracts.

Searching for a Contract

The upper part of the *Browse Contracts* page contains search filters. These filters let you easily retrieve an item or a set of items meeting specific criteria.

1. Define your search criteria by selecting appropriate filters.
2. When done, click the **Search** button to start searching. Matching items are displayed in the results list.
To cancel selected filters and go back to the default list, click the **Reset** button.

Viewing a Contract

1. Access the Contract Repository (*Contracts / Browse Contracts* menu). The *Browse Contracts* page displays.

Note: By default, the contract list is filtered on your scope of action. To display all contracts, deselect the option *Selection limited to my perimeter* in the *Advanced search* section.

2. In the contract list, locate the contract you wish to view and click its label. The contract details display.

Contract Record

Getting familiar with the Contract Record

All information relating to a particular contract is gathered in a Contract Record, and is structured into the following tabs:

Tab	Description	See page:
Contract Header	Contract identity sheet: Code, supplier, commodity, etc.	11
Authoring (clauses)	Built-in contract authoring tool with standard template and clause libraries. The authoring tool may assist buyers/contract managers in the negotiation process by allowing online interaction with the supplier.	12
Team	List of participants involved in the contract creation and management	12
Negotiated terms	Summary of the contract's main terms & conditions: total contract amount, payment term and type, conditions for price, invoicing, payment, delivery, and warranty, renegotiation threshold, penalties, claim & return procedures, selection criteria	13
Dates and Renewals	Milestone dates that rule the contract life cycle and determine the validity status	14
Contract scorecard	Supplier score in relation to contract implementation and compliance	16
Items/Services	(Frame agreements only) Lets you select or create the items covered under the contract (profile must have authorization to edit contracts) View and order these items	17
Orders	List of orders whose line items are covered under the contract	18
Lifecycle workflow	Status of the contract within its approval workflow	18
Exhibits	Documents attached to the contract	19

Contract Header Tab

The screenshot displays the 'Contract Header Tab' for a contract titled 'Contract: Horizon Master Agreement'. The interface includes a top navigation bar with tabs: Contract Header, Team, Dates and Renewals, Negotiated terms, Exhibits, Authoring (clauses), Items/Services, Lifecycle Workflow, Order, and a search icon. The 'Contract Header' tab is active.

Information Section:

- Reference code: [Empty field]
- Contract: Horizon Master Agreement *
- Contract type: Master Agreement (buying)
- Contracting Party: Horizon Telecom ... *Horizon Telecom
- Contracting Entity: Ino - New Orleans ... *Ino - New Orleans
- Organizations Affected (internal):** [Empty field] ... *Ino - New Orleans
- Commodities Affected:** [Empty field] ... *1 - IT - Telecom

Alerts (0) Section:

- Add alert: [Empty field]

Contract Details:

- Internal code: CTR000032
- Status: Approval in progress
- Validity status: Running
- Language: English
- Linked Sourcing Process: [Empty field] ...
- Location (national regulations): [Empty field]

Contract tree:

- CTR000032 Horizon Master Agreement
- CTR000033 Configured Laptop Rate card

Attachments:

- en [Add Document]

Exceptions:

- Create Exception
- 0 Result(s)

Created by:

- Created by Admin Paul on 1/9/2014.
- Modified by A DE on 7/24/2014.

At the bottom, there is a footer bar with 'Buyer demo v8.128' and buttons for 'Save' and 'Other Actions'.

This tab is the contract identity sheet.

It includes:

- the contract internal code, name, reference, and type,
- the supplier involved (click the supplier name to open their record in a secondary window),
- the management organization,
- the organizational and purchase scopes covered,
- a clickable tree structure of the contract,
- the contract language and applicable law
- an Alert frame allowing to position manual alerts and later search and retrieve contracts based on these alerts
- any links to attachments or amendments
- the contract approval status:

A contract is created in the *Initialized* status. To enable it and make it usable, you need to submit it to approval (see page 28).

Once approved, the contract moves to the *Validated* status.

Its status is automatically set to *Ended* when it reaches its end date or when it is voluntarily terminated.

Authoring (clauses) Tab

Contract: Horizon Master Agreement 10 Req.

Contract Header Team Dates and Renewals Negotiated terms Exhibits **Authoring (clauses)** Items/Services Lifecycle Workflow Order

Manage the written clauses of the Contract, importing from templates or adding and editing blank clauses

Version : -- Current --

Import Word : **Add Document**

Search :

- ☒ Item 1 - Contractual documents
- ☒ Item 2 - Contract duration
- ☒ Item 3 - Infringement
- ☒ Item 4 - Tacit contract renewal
- ☒ Item 5 - Confidentiality
- ☒ Item 6 - Liability
- ☒ Item 7 - Insurance
- ☒ Item 8 - Ethic
- ☒ Item 9 - Sustainable development
- ☒ Item 10 - Applicable law
- ☒ Item 11 - Resolution of disputes
- ☒ Item 12 - ICC Arbitration
- ☒ Item 13 - Subcontracting

Item 1 - Contractual documents

The contractual relations between the parties shall be governed by the following documents, listed in descending order of their legal validity:

- Amendments to the contract,
- The contract and the following exhibits :
 - o Exhibit 1 : <to be defined>

In case of contradiction or divergence between these documents, they prevail according to their descending order.

The contractual documents listed above constitute the entirety of the parties' agreement related to their subject matter and supersede any declaration, negotiation, commitment, communication, whether oral or written concluded between the parties. The contract shall only be modified through an amendment.

The parties acknowledge and agree that none of their general terms and conditions used by each of them for business purposes shall apply to the contract.

Item 2 - Contract duration

This contract shall commence on 1/9/2014

Item 3 - Infringement

SUPPLIER shall, at its own expense, (i) defend, indemnify and hold harmless the Customer including any of its affiliates, divisions, related entities, and their respective directors, officers, managers, employees, members, shareholders and agents and all of their respective successors and permitted assigns in any claim or legal action, alleging that the purchase or use of the Software or any portion thereof directly infringes any patent, trademark or copyright ("Infringement Claim"); and (ii) pay any final award for infringement granted to the third party Intellectual Property Right owner(s). As a condition of such defense or payment, the Customer is required to (i) give SUPPLIER prompt written notice of any Infringement Claim; (ii) provide Ivalua with the sole control of the defense and/or settlement of the Infringement Claim;

Buyer demo v8.128

Save **Other Actions**

This tab is a built-in collaborative authoring tool that allows in-house and external stakeholders to contribute towards assembling and customizing the contract, based on pre-approved template and clause libraries.

See also:

Authoring the Contract Collaboratively, page 39

< Contract: Horizon Master Agreement

Contract Header | **Team** | Dates and Renewals | Negotiated terms | Exhibits | Authoring (clauses) | Items/Services | ⌵

▼ Manage Participants in the Contract Lifecycle process

▼ Supplier Contacts

Select a contact already defined on the supplier : ▼

Add a contact

	Name	Login	Email	Phone	Cell Phone	Fax	Position	Profile	Status
X	CROFT Maggie	horizon	horizon@test.com	(+344) 757-0099			VP of Distribution	Dev. Design Extranet, Supplier	Validated
X	EAGLE Leighal		legalhorizon@test.com				Legal Counsel		Validated

▼ Internal users

Lookup Users...

	Login ▶	Email ▶	Profiles
X ADMIN Paul	pno	pauladmin@test.com	⌵ ✖ Contract - Owner
X GISSON Andre	agi		⌵ ✖ Contract - Contributor

Two separate frames allow you to select 2 different types of contacts: internal users and supplier contacts. Supplier contacts can be created directly from this tab.

Declaring the Team in Charge, page 24

Negotiated Terms Tab

Contract: Horizon Master Agreement 10 Req.

Contract Header Team Dates and Renewals **Negotiated terms** Exhibits Authoring (clauses)

Contract Value and Utilization

Total amount : 100,000.00 USD

Key Variable Terms and KPIs

Payment type : Bank check	Payment term : 30 days invoice date
Price conditions :	Invoicing conditions :
Delivery conditions :	Payment conditions :
Warranty conditions :	Renegotiation threshold :
Penalties :	Complaint procedure :
Return procedure :	Choice criteria :

Buyer demo v8.128





Save Other Actions


This tab presents key information related to the negotiated contract terms; it specifies the overall contract amount and the currency used to express monetary amounts.

When items are linked to the contract (the contract type must include the *Items/Services* tab), the *Calculated amount* will display to the right of the *Total amount*. The *Calculated amount* is equal to the **[negotiated quantity * retail price]** of items added to the *Items/Services* tab.



The payment type and term entered here are used to prepopulate purchase orders related to the contract. If they are not provided in the contract, the system will use the payment type and term set in the Supplier Record (*Legacy data* tab).



Dates and RenewalsTab



Contract: FRDELL001 - Accord cadre DELL France 10 Req.    


Contract Header Team **Dates and Renewals** Negotiated terms Exhibits Authoring (clauses) Items/Services 



Milestones




Contract Start : 1/1/2012  ☐ No end date contract  Status : Approval in progress




Contract End : 1/1/2013  

Actual end date : 1/1/2016  

Contracting date : 12/1/2011 

Renewal type : Auto-renewal same terms  Renewal term (months) : 12 


Termination Notification (months) : 3  Notification date override : 10/1/2015  


Time to study (in months) : 1  Renegotiation Date : 9/1/2015  


Audit Trail of Renewals and other Date changes





Version ▶	Initial end date ▶	Renewal type ▶	Renewal date ▶	Renewed by ▶
1	1/1/2013	Auto-renewal same terms	5/24/2012	A DE

1 Result(s)

Termination 

Termination date : 

Reason for termination : 

Buyer demo v8.128   Save  Other Actions 

The *Dates* tab specifies the milestone dates that rule the contract life cycle.





See also:

Contract Dates and Validity Statuses, page 28

Managing contract renewals, amendments, and termination, page 32

Contract scorecard Tab

Contract: FRDELL001 - Accord cadre DELL France

10 Req.    

Contract Header | Team | Dates and Renewals | Negotiated terms | Exhibits | Authoring (clauses) | Items/Services | Lifecycle Workflow | Order | **Contract Scorecard**

Filter

Questionnaire : ... Questionnaire type : Year :

Status :

Q Search **Reset**

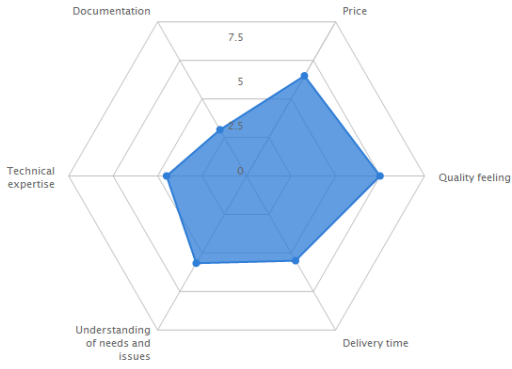
Quick Eval on Supplier

Launch Evaluation Campaign


Evaluations

Fast supplier evaluation - Mark : 5.63

Fast supplier evaluation



Proposal evaluation	5.63
Price	6.50
Quality feeling	7.50


Buyer demo v8.128  **Save** **Other Actions**

This allows you to create 2 types of evaluation:

- Spot or Quick evaluation of the current contract (**Quick Eval on Supplier** button)
- Evaluation campaign, on various contracts attached to a same commodity for instance (**Launch Evaluation Campaign** button)





The tab also presents evaluations already performed, indicating for each questionnaire used:

- The name of the questionnaire type and the overall score obtained
- A radar chart featuring a branch for each rated criteria (if there are 2 or less criteria, then a bar chart replaces the radar chart)
- A table listing the scores per criteria


The **Word**  icon will let you extract the data from this tab in MS Word® format.

A synthesis of all the scores assigned to the supplier on their various linked objects (contracts, orders, etc.) is available in the Supplier Record (*Performance Rating* tab). For further information on this point, please refer to the *User Manual* for the *Suppliers* module.







Items/Services Tab

Contract: Configured Laptop Rate card 10 Req.    


Contract Header Team Dates and Renewals Negotiated terms Exhibits Authoring (clauses) **Items/Services** Lifecycle Workflow



Manage the Items and Services that are a measurable part of this contract 

Add Proposal items **Create / Add existing item**

	Comparison	Commodity	Item	Image	Supplier Ref.	Unit price	Curr.	Unit	Start	End	Proposal / Item
X			Laptops	Dell Latitude configured for Sales		660.00	USD		1/10/2014	1/31/2015	PR000066 / I2
X			Laptops	Dell Latitude E6430s		340.00	USD		1/10/2014	1/31/2015	PR000066 / I1

2 Result(s)

Buyer demo v8.128 

 Save **Other Actions** 

Some types of contract can be linked to one or more catalog items. When the contract type allows defining this kind of link, the contract will include an *Items/Services* tab. In the standard version of the application, this tab is available for the following types *Master Agreement*, *Pricing Agreement* and *Amendment*.

The validity period of a catalog item can be defined in the Price Sheet. When the item is linked to a contract, the item's validity period must be consistent with that of the attached contract. Consistency is enforced using the following rules:

- When the item's validity period is not specified, the item inherits the validity period of the contract.
- It is possible to set an item validity period that is distinct from that of the contract; however, the item validity period must be included in the contract validity period. For instance, you may have an item that is listed at US\$200 according to contract terms but which is temporarily on sale at US\$150.

In the *Items/Services* tab of the contract, items whose validity dates are defined at item level and not at contract level are displayed in orange characters.

- The item validity period cannot be set before or beyond the contract validity period. However, if the end date of a contract that is already linked to items is changed to an earlier date, you may end up with item validity dates that exceed the contract validity period. In the *Items/Services* tab of the contract, such dates are signaled in red characters and a warning message is displayed ("Some items have validity dates outside of their contract validity period.").

This tab lists the items that are covered under the contract. It may be present or not depending on the contract type (in the standard version of the application, it is displayed for the types: *Master Agreement*, *Pricing Agreement* and *Amendment*).

The button **Create/Add existing item** lets you add items to the contract directly from this tab (□P.71). In the same way, items that have been created in the Catalog menu, if linked to the contract, will be listed in this tab.

When the Sourcing module is enabled, you may also load proposal items, meaning items whose price has been negotiated in an RFP (**Add Proposal Items** button) (□P.75).

Once items have been added, purchase requisitions may be initiated directly from this tab.





See also:

Adding an item to a , page 71

Adding RFx proposal items/services to a contract, page 75




Creating a purchase requisition from a Frame Agreement, page 72

See also:*Managing the Contract Workflow, page 28***Exhibits Tab**


Contract: Horizon Master Agreement 10 Req.    

Contract Header | Team | Dates and Renewals | Negotiated terms | **Exhibits** | Authoring (clauses) | Items/Services





Add document

		Title ▶	Type ▶	Attachments	Author ▶	Modified on (your local time) ▶	Created on (your local time) ▶	End of validity ▶	Version
		Signed contract	Principal Contract (Approved)		A DE		7/25/2014 12:27:00 PM		Signed contract



1 Result(s)

 Zip selected Documents

Create a Signature Transaction

		Created on ▶	Created by ▶	Launched by ▶	Status ▶	Document(s)	Signers	Start ▶	End ▶ 
		1/20/2014 11:34:44 PM	Mr. Admin Paul	Mr. Admin Paul	Initialized		Mr. ANONYMOUS and		

1 Result(s)

Buyer demo v8.128 ©  Save  Other Actions ▶

This tab is used add/view documents attached to the contract.

There are 2 document statuses: Draft (highlighted in orange and Validated. This feature lets you manage multiple versions of a document.

To display a document listed in this tab, click the document title and/or its attachment icons.

This is also where you can initiate e-signature transactions on any of the uploaded documents in this tab.

CREATING A CONTRACT AND DECLARING THE TEAM IN CHARGE


Creating / Editing a Contract

Creating a new contract

1. Access the Contract Repository (*Contracts / Browse Contracts* menu). The *Browse Contracts* page displays.
2. Click the **Add a contract** button. The *Contract details* page displays. At this stage, the Contract Record contains only one tab: the *General Information* tab.
3. Fill in the *General Information* tab. You are required to specify at least the contract label, the contract type, and the supplier. You may also want to assign the contract to specific purchase perimeter and/or organizational perimeter.
4. Click the **Save** button. The contract is saved and new tabs display in keeping with the selected contract type.
5. Fill in the other tabs of the Contract Record. For further reference on contract tabs, see *Contract Record*, on page 10.
6. Click the **Save** button.
The new contract is created. Its status is set to *Initialized*.
7. Before you may further edit the contract, you must set the contract *Initial end date*. To do so, display the *Dates* tab, enter the *Initial end date* and click the **Save** button.

Before the contract may be used by IVALUA BUYER users, you must submit it to approval (see page 28).

Editing an existing contract

1. Access the Contract Repository (*Contracts / Browse Contracts* menu).
2. Click the *Edit* icon  associated to the contract you wish to edit. The Contract Record displays.
3. Enter your edits.
4. Click the **Save** button.


Declaring the Team in Charge

The list of people who participate in the contract creation and management should be declared in the *Team* tab. Team members can be either internal users or supplier contacts.

Internal users

The users listed may be granted specific permissions in relation to the contract, independently of their user scope and of the authorizations that may have been assigned to their profile over the Contracts module. These specific permissions are assigned through the following local profiles: Owner, Contributor, and Guest. Associated standard permissions over the contract are as follows:

Profile	View	Modify	Delete
Owner	X	X	X
Contributor	X	X	
Guest	X		

To add a participant, click the **Add a user** button and select the desired users by clicking their selection icon . When done, click the **Close** button.

Selected users are automatically assigned the *Contributor* profile. You may change the default profile assignment.

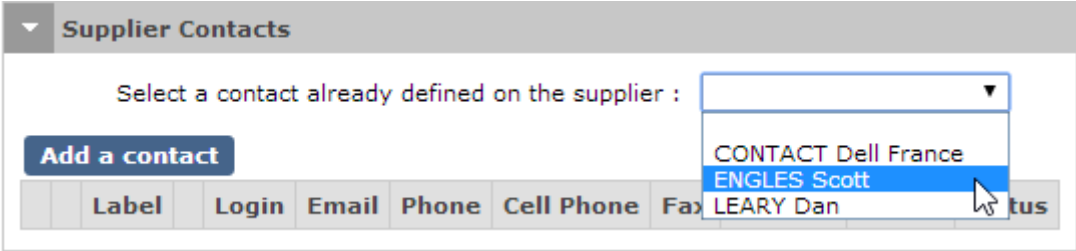
When a user is listed in the *Team* tab, you may click:

- The user name in order to view their contact sheet
- The user email address in order to send them a message using your email client

Supplier contacts

To add a supplier contact, you can:

- Select it from the drop-down list if the contact is already declared on the supplier's record
- Create it by clicking the button **Add a contact**



MANAGING THE CONTRACT'S LIFE CYCLE

Identification of Contracts in Force

Contracts in force are determined based on 2 different statuses: the workflow status and the validity status.

- The workflow status indicates whether the contract is active depending on its progression with regards to the defined workflow steps, for instance: authoring, execution, or archiving of physical document.
- The validity status indicates whether the contract is valid with regards to its milestone dates. It is calculated by an automatic job that runs daily and checks the contract validity against the contract dates.

The specific workflow and validity statuses in which the contract is considered “in force” and may be used are defined according to each company’s requirements.

An alert message is displayed in the *General information* tab when the contract is valid (dates OK) but has an inactive workflow status.

▼ Alerts (1)

Add alert : 

 **- Valid contract but progress status inactive**

Managing the Contract Workflow

Understanding workflow statuses

The contract workflow status is displayed in the *Progress* column of the Contract Repository search page, and in the *Status* field of the *General information* tab of the contract record.


In the Contract Repository search page, contracts can be searched by progress status and validity status.

Submitting a contract to validation

To make the contract usable, you need to submit it to validation. To do so:

1. Open the Contract Record.
2. Click the **Submit to validation** button. The contract approval process is now underway; you may view the progress of the validation workflow in the **Validation** tab.

Validating or Rejecting a validation workflow step

1. On your homepage, in the *My actions* section, click the *Edit* icon  associated to the validation request you wish to process. The corresponding Contract Record displays.
2. To validate the step, click the validation button (the button label may vary according to the considered validation task, however a validation button is always colored in green).
3. To reject the step, click the rejection button (the button label may vary according to the considered validation task, however a rejection button is always colored in red).

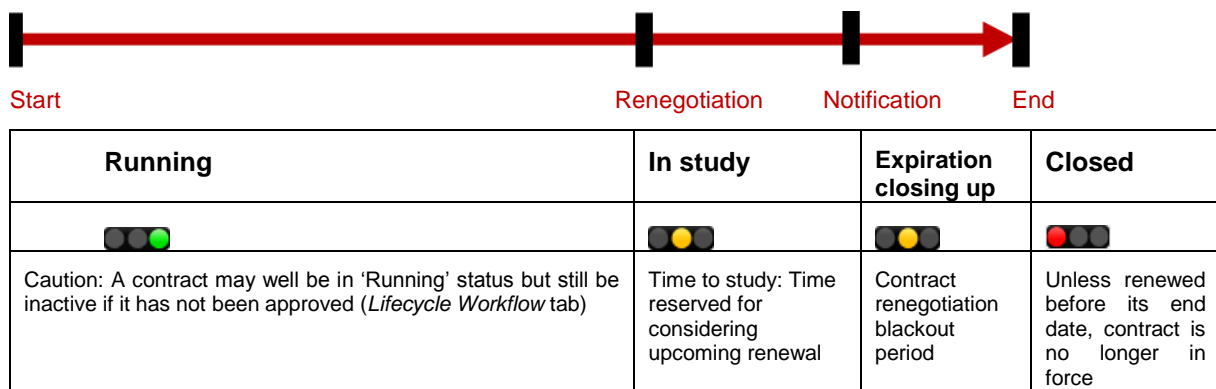
In case of rejection, it is advisable to **insert an explanatory comment** aimed at the requester in the *Comment* section of the *Workflow* tab (to do so, enter your comment in the edit box, then click the **Save** button).

In case of rejection, the requester is notified. He may view your comment and/or alert; if applicable, he may modify his request and, again, submit it to validation.

Contract Dates and Validity Statuses

Contract life cycle

The diagram below presents key milestones and statuses of the contract life cycle. These points are detailed in the rest of this section of the manual.



Contract milestone dates





The table below describes the contract milestone dates and how to use them:

<i>Date</i>	<i>Description</i>
Contracting date	Date the contract was signed – The signature date may differ from the <i>Contract Start</i> date
Contract Start	Date on which the agreement takes effect (included in the validity period)
End date	<p>Date on which the agreement expires (included in the validity period)</p> <ul style="list-style-type: none"> Contract End = End date initially planned in the contract Actual end date = Updated end date (subsequent to a renewal) – When specified, the <i>Actual end date</i> prevails over the <i>Initial end date</i>
Renegotiation date	<p>Date earlier than the notice date</p> <p>The period between the <i>Renewal study date</i> and the <i>Notice date</i> allows you to assess whether the contract should be renewed or terminated. This date must be earlier than the notification date since it must factor in the time involved in reviewing contractual terms, negotiating new terms, and potentially, negotiating with new suppliers.</p> <p>The purpose of the study date is to trigger an email notification well in advance so that you may take the necessary actions and do not miss out on an opportunity to renegotiate or terminate evergreen agreements ("auto-renewal same terms" or no-end-date contracts).</p> <p>If the <i>Renegotiation date</i> is not specified, the email notification will be sent when the current date is equal to the end date (initial or actual) minus the termination notification term and minus the time to study.</p> <p>When both the renegotiation date and the time to study are specified but do not coincide (for instance the date specified corresponds to a shorter term than the specified time to study), the renegotiation date will prevail over the specified time to study period. This operating mode can be useful when the regular time to study occurs at a time that is not convenient (vacation for instance): you can then use the <i>Renegotiation date</i> field to trigger the notification on a more convenient date.</p>
Notification date override	<p>Date before which the contract should be revoked to oppose auto-renewal, or renewed to avoid expiration in the absence of auto-renewal clause.</p> <p>The notification date triggers an email notification. If the notification date is not specified, the email notification will be sent when the current date is equal to the end date (initial or actual) minus the termination notification term.</p> <p>When both the date and period are specified but do not coincide, the date will prevail over the specified period.</p>
Termination date	<p>Date the contract was terminated – When specified, the <i>Termination date</i> prevails over the <i>Initial end date</i> and the <i>Actual end date</i>.</p> <p>Caution: The termination date is included in the contract's validity period; the contract is actually terminated (status: <i>Ended</i>) when this date is passed.</p>

Validity statuses

A contract is valid from its coming into effect (i.e. upon the contract start date) until its end date is passed (its end date can be either one of the following: Contract End date, Actual end date, or Termination date). This means that the contract end date (including the termination date when specified) is included within the validity period.

The contract validity status is automatically updated by a scheduled background job. When this job runs (daily), the application checks the contract milestones against the current date and applies the following rules in shown order:

Status	Associated picto	Description (*)
<i>Initialized</i>	(no picto)	Current date < Contract Start date Also contracts with an end date, but whose end date has not yet been specified, have this status.
<i>Running</i>		Current date > Contract Start date
<i>In study</i>		Current date > Renegotiation date
<i>Expiration closing up</i>		Current date > Notification date If the contract has an auto-renewal clause, the <i>In study</i> status is automatically changed back to <i>Running</i> upon Notification date (if specified), or upon end date minus termination notification period (if specified), or upon end date. Indeed, as of the notification date, we know as a fact that the contract will be renewed because it can no longer be renegotiated nor terminated.
<i>Closed</i>		Current date > Termination date Current date > Initial end date or Actual end date

(*) If the date is not provided, condition cannot be checked and status is not updated.

Notifications

Triggering events

Notifications can be sent upon the following events:

- Renegotiation date
- Notification date
- Automatic renewal (will occur upon notification date if specified, or upon end date minus termination notification period if specified, or upon contract initial or actual end date)

Recipients

Notifications are automatically sent to the contract stakeholders listed in the *Team* tab.

Toggling notifications On/Off

Contract notifications can be toggle on or off using the following parameters:

Triggering event	Parameter
Renegotiation Date	ctr_notify_ctr_study - Enable sending mails when it's time to renegotiate the contract and consider whether to renew it or not
Notification Date	ctr_notify_ctr_notice - Enable sending mails upon notification date override
Renewal	ctr_notify_ctr_renew - Enable sending mails upon automatic renewal of contracts

Specificities of no-end-date contracts

Some contracts tend to be long standing and indefinite in duration. To account for the specificities of these contracts, you should enable the *No end date contract* check box.

The screenshot shows a web application interface for managing contracts. The title bar indicates the contract is 'OR/IV452 - Contrat d'abonnement téléphonie'. The 'Dates' tab is selected, showing fields for 'Date d'effet' (14/05/2008), 'Date de signature' (10/05/2008), and 'Date de renégociation'. A checkbox labeled 'Contrat sans date de fin' is checked and highlighted with a red box. The status is 'Initialisé'. Below this, there is a section for 'Liste des renouvellements' showing 0 results. Another section for 'Résiliation' includes a date field and a text area for the reason. At the bottom, there are buttons for 'Enregistrer' and 'Autres actions'.

With this type of contract, you may define a *Renegotiation date* (optional). When specified, the *Renegotiation date* will trigger a notification.

No-end-date contracts never expire: their validity status is either green (running), or orange (*In study*).

On the contract search page, use the filter *Only no end date contracts* to easily retrieve this type of contract.

Managing contract renewals, amendments, and termination

Types of Renewals

Contract renewal lets you extend the validity period, while keeping track of the original dates in the *Audit trail of renewals and other date changes* area (*Dates and Renewals* tab of the contract record). Renewal may either be manual (**Renew** button) or automatic (scheduled task):

- Scheduling an automatic renewal, see page 32
- Renewing a contract manually, see page 33

The system can be set up so as to alert contract managers ahead of the expiration date of the termination notification period, giving them time to renegotiate or terminate auto-renewal contracts, and renegotiate or renew contracts coming to an end (see *Notifications*, page 30).

Scheduling an automatic renewal

1. Open the contract.
2. Display the *Dates and Renewals* tab.
3. Set the Renewal type on Auto-renewal same terms.
4. Enter the Renewal term.

Contract: FRDELL001 - DELL France Master Agreement

10 Req. [Icons]

Contract Header | Team | **Dates and Renewals** | Negotiated terms | Exhibits | Authoring (clauses) | Items/Services

Milestones

Contract Start : 1/1/2012 [Calendar] ☐ No end date contract ⓘ Status : Approval in progress

Contract End : 1/1/2013 [Calendar] ⓘ

Actual end date : 1/1/2016 [Calendar] ⓘ

Contracting date : 12/1/2011 [Calendar]

Renewal type : Auto-renewal same terms [Dropdown] Renewal term (months) : 12 ⓘ

Termination Notification (months) : 3 ⓘ Notification date override : 10/1/2015 [Calendar] ⓘ

Time to study (in months) : 1 ⓘ Renegotiation Date : 9/1/2015 [Calendar] ⓘ

Audit Trail of Renewals and other Date changes

Version	Initial end date	Renewal type	Renewal date	Renewed by
1	1/1/2013	Auto-renewal same terms	5/24/2012	A DE

1 Result(s)

Termination ⓘ

Termination date : [Calendar]

Reason for termination : [Text Area]

Buyer demo v8.128 [Save] [Other Actions]

5. Click the **Save** button.
When the contract reaches its notification date (if provided), or end date minus termination notification period (if provided) or end date, the Actual end date, Notification date override, and Renegotiation date are automatically updated against the specified Renewal term, Termination Notification (renegotiation blackout period), and Time to study. Also worth to note is the fact that when the contract reaches its notification date, it is immediately renewed and its status moves to *Running* (without going through the *Expiration closing up* status); indeed, as of the notification date, we know as a fact that the contract will be renewed because it can no longer be renegotiated nor terminated.




A new entry is created in the list *Audit trail of renewals and other date changes*.


Audit Trail of Renewals and other Date changes

Version	Initial end date	Renewal type	Renewal date	Renewed by
1	1/1/2013	Auto-renewal same terms	5/24/2012	A DE



Renewing a contract manually



1. Open the contract.
2. Display the *Dates and Renewals* tab.
3. Enter the following terms in months:
 - Renewal term
 - Termination Notification period
 - Time to study



Contract: Horizon Master Agreement 10 Req.   


Contract Header Team **Dates and Renewals** Negotiated terms Exhibits Authoring (clauses) Items/Services Lifecycle Workflow Order 



Milestones




Contract Start : 1/9/2013  ☐ No end date contract  Status : Approval in progress




Contract End : 1/9/2014  

Actual end date :  


Contracting date : 8/19/2013 


Renewal type : Renewal with Negotiable terms  Renewal term (months) : 12 


Termination Notification (months) : 1  Notification date override :  





Time to study (in months) : 2  Renegotiation Date :  

Audit Trail of Renewals and other Date changes
0 Result(s)

Termination 

Termination date : 

Reason for termination : 

Buyer demo v8.128   Save  Other Actions 

4. Click the **Other Actions > Extend end date (renew)** button. A message displays, prompting you to confirm your request.
5. Click **OK**.
The Actual end date, Notification date override, and Renegotiation date are automatically updated against the specified Renewal term, Termination Notification (renegotiation blackout period), and Time to study.

A new entry is created in the list *Audit trail of renewals and other date changes*.

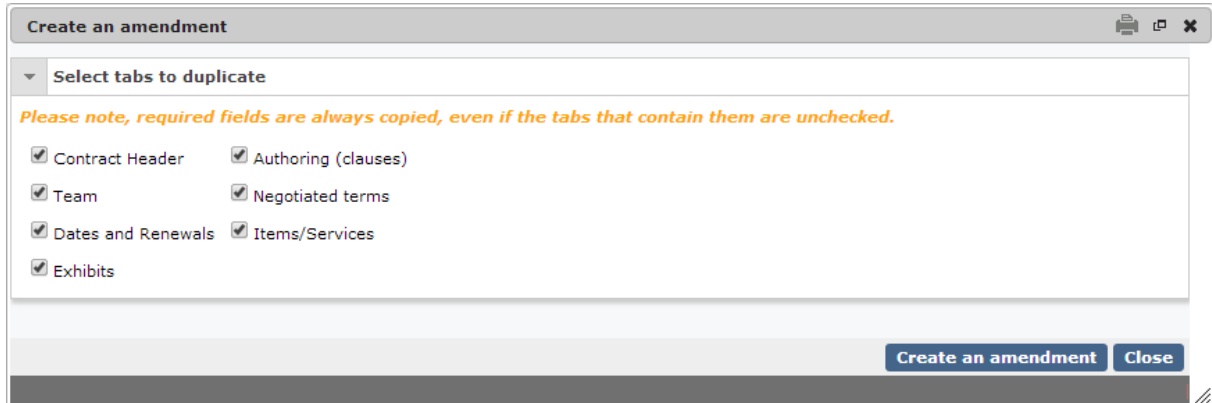
Audit Trail of Renewals and other Date changes

Version >	Initial end date >	Renewal type >	Renewal date >	Renewed by >
1	1/9/2014	Renewal with Negotiable terms	7/29/2014	A DE

Creating an Amendment

Amendments should be created from within the contract to be amended.

1. Open the Contract.
2. Click the **Create an amendment button**.
3. In the window that displays, select the tabs you wish to replicate in the amendment.



Create an amendment

▼ Select tabs to duplicate

Please note, required fields are always copied, even if the tabs that contain them are unchecked.

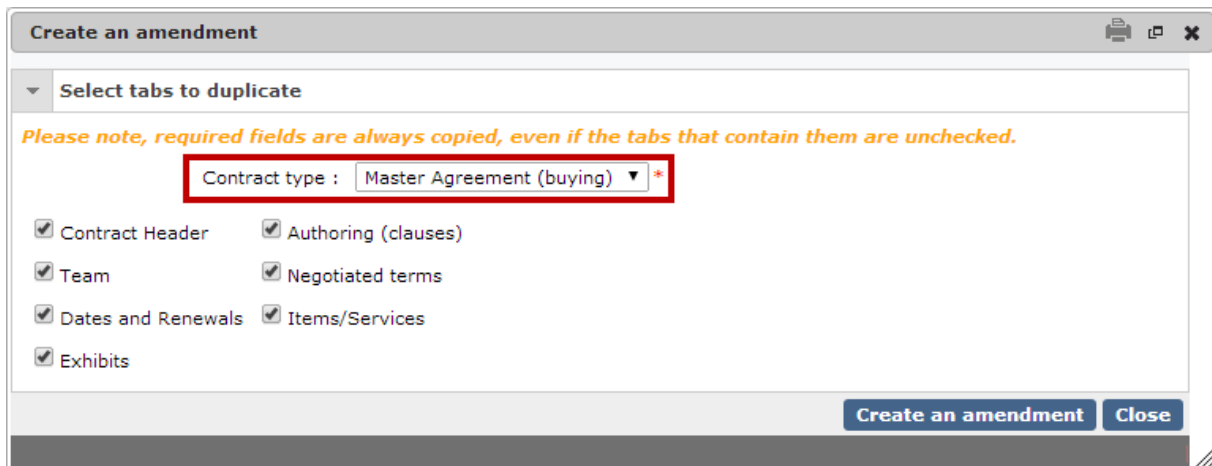
<input checked="" type="checkbox"/> Contract Header	<input checked="" type="checkbox"/> Authoring (clauses)
<input checked="" type="checkbox"/> Team	<input checked="" type="checkbox"/> Negotiated terms
<input checked="" type="checkbox"/> Dates and Renewals	<input checked="" type="checkbox"/> Items/Services
<input checked="" type="checkbox"/> Exhibits	

Create an amendment **Close**

By default, an amendment has the same type as the initial contract. Depending on configuration (parameter `ctr_amendment_change_type`), the amendment type can be selected upon its creation.

When this is enabled, a Contract type drop-down list will be available in the amendment creation window, defaulted to the initial contract's type.

Changing the contract type will refresh the list of tabs available for duplication (depend on type).



Create an amendment

▼ Select tabs to duplicate

Please note, required fields are always copied, even if the tabs that contain them are unchecked.

Contract type : Master Agreement (buying) ▼ *

<input checked="" type="checkbox"/> Contract Header	<input checked="" type="checkbox"/> Authoring (clauses)
<input checked="" type="checkbox"/> Team	<input checked="" type="checkbox"/> Negotiated terms
<input checked="" type="checkbox"/> Dates and Renewals	<input checked="" type="checkbox"/> Items/Services
<input checked="" type="checkbox"/> Exhibits	

Create an amendment **Close**

- Click the **Create an amendment** button. A message displays, prompting you to confirm your request.
- Click **OK**. The contract amendment displays.

Contract: Amendment Laptop renewal plan - R&D-Horizon - Austin #1

10 Req. [Icons]

Contract Header | Team | Dates and Renewals | Negotiated terms | Exhibits | Authoring (clauses) | Lifecycle Workflow

Information

Reference code :

Amendment number : 1

Contract : Amendment Laptop renewal plan - R&D-Horizon

Contract type : Scope of Work (buying)

Contracting Party : Horizon - Austin

Parent Agreement : ...

Contracting Entity : na - NORTH AMERICA

Organizations Affected (internal)

xbos - Boston

Commodities Affected

Alerts (1)

Add alert :

- Valid contract but progress status inactive

Internal code : CTR000051

Status : Drafted

Validity status : Running

Language :

Linked Sourcing Process :

Location (national regulations) :

Contract tree

- CTR000048 Laptop renewal plan - R&D-Horizon - Austin
 - CTR000051 Amendment Laptop renewal plan - R&D-Horizon - Austin #1

Attachments

en

Exceptions

0 Result(s)

Created by
Created by A DE on 7/28/2014.

Buyer demo v8.128


The contract amendment is inserted in the contract tree structure, under the initial contract. It is identified by a unique auto-incremented number (field: *Amendment number*). The initial contract's label and the amendment number are included in the amendment name: "Amendment [name of the initial contract] #[Amendment #]" (this label can be edited as required).

- Review the auto populated data that was inherited from the initial contract and edit it as required; fill in the remaining blank fields.
- Click the **Save** button.
The contract amendment is created; its status is set to *Initialized*. To make it available to users, you should submit it to validation (see *Understanding workflow statuses*, on page 28).


Note: In the contract list, amendments are not displayed when the filter *Only main contracts* is enabled.

Terminating a Contract

You may terminate a contract before it reaches its end date. When specified, the termination date overrides all other end dates (initial or actual).

- Open the Contract.
- Display the *Dates and Renewals* tab.
- In the *Termination* section, click the *Calendar* icon  placed next to the *Termination date* field, and select the desired date.

Caution: The termination date you define here is included in the contract's validity period; the contract is actually terminated (status: *Ended*) when this date is passed.

- In the edit box *Reason for termination*, insert a comment stating the motives for terminating the contract.
- Click the **Save** button.
Termination will be effective upon automatic execution of the contract status management job (daily). In the contract list, the validity status of the terminated contract turns to red: .

USING THE AUTHORIZING TOOL

Authoring the Contract Collaboratively

Overview

IVALUA BUYER provides business organizations with a powerful tool for natively authoring contracts.

Standard contract clauses and templates are authored centrally by your company. Local operating units can then use these templates and clauses, and customize them to meet their specific local requirements.

Centrally authored clauses and templates help codify best practices and promote the use of consistent and compliant contract standards throughout your organization.

They also carry the additional benefits of supporting buyers during the negotiation process and shortening time-to-contract.

Clause set templates

Definition

A template is a particular assembly of clauses. It is not linked to a given contract; however, it can be linked to a language, or to specific contract types, purchasing scope or organizational scope.

Templates will typically be created when the same assembly of clauses will be used repetitively, since they provide a framework from which users can rapidly build customized documents.

The ability to access, edit, create, or delete templates is granted through authorizations.

Creating a new clause set template

1. Select the Contract / Manage Contract Templates menu.
The *Manage Contract Templates* page displays.
2. Click the Create new template button.
The *Contract template details* page displays.
3. Fill in the General information tab:
 - Give a name to the new contract template.
 - Select the appropriate language.
 - Select relevant contract types.
 - Select purchasing and organizational scopes.

Contract template details

11 Req.

General information

Internal code :

Reference code :

Template : Office Supplies Contract Templa *

Status : Drafted

Language : English

Contract types

Master Agreement (buying)

Purchasing scope

2D1 - Office supplies

Organizational scope

US - United States

Buyer demo v8.128

Save

4. Click the **Save** button.
The *Authoring* and *Validation* tabs become available.

✓ Data have been saved

Suppliers Sourcing **Contracts** Items Procurement Invoices Expenses Reporting

Contract template : Office Supplies Contract Template 11 Req.

General information Authoring (clauses) Validation

Internal code : TPL000009

Reference code :

Template : Office Supplies Contract Templa*

Status : Drafted

Language : English

Contract types

Master Agreement (buying)

Information

Created by A DE on 7/31/2014

Purchasing scope

2D1 - Office supplies

Organizational scope

US - United States

Buyer demo v8.128 ©

Generate the document Submit Save

5. Display the Authoring (clauses) tab.

Contract template : Office Supplies Contract Template 11 Req.

General information **Authoring (clauses)** Validation

Version : -- Current --

Import Word : Add Document

Search :

Search Clause Library

Template : ...

Buyer demo v8.128 ©

Generate the document Submit Save

6. Build your template using the authoring features described in this section:

For further information on:	Refer to page:
Clauses	43
Merge fields	52
Clause revisions, document versions and change history	56
Collaborative work	60

7. When done, click the **Submit** button located in the action bar.

Clause set documents

Definition

A clause set document is specific to the contract record it is created in.

It is entirely composed of clauses, which can be loaded through the selection of a template or the selection of existing individual clauses, or can be authored from scratch.

Creating a clause set document from a template

1. Open the contract record and display the *Authoring (clauses)* tab.

Contract: Laptop renewal plan - R&D-Horizon - Austin

10 Req. [Shopping Cart] [Search] [Star] [Print]

Contract Header | Team | Dates and Renewals | Negotiated terms | Exhibits | **Authoring (clauses)** | Lifecycle Workflow

Manage the written clauses of the Contract, importing from templates or adding and editing blank clauses

Version : -- Current -- [Edit] [Download] [Upload] [New]

Import Word : **Add Document**

Search : [Search] [Checkmark]

Search Clause Library [Refresh]

Template : ...

Buyer demo v8.128 ©

Save **Other Actions** **Back order** **Submit**

2. Click the *Browse* button ... associated with the *Template* field.

Manage Contract Templates

Filter

Keywords : [Search] [Reset]

Contract type : [Scope of Work (buying)] Contract language : [] Commodity : [] Organization : [x bos - Boston]


Status : Approval in progress

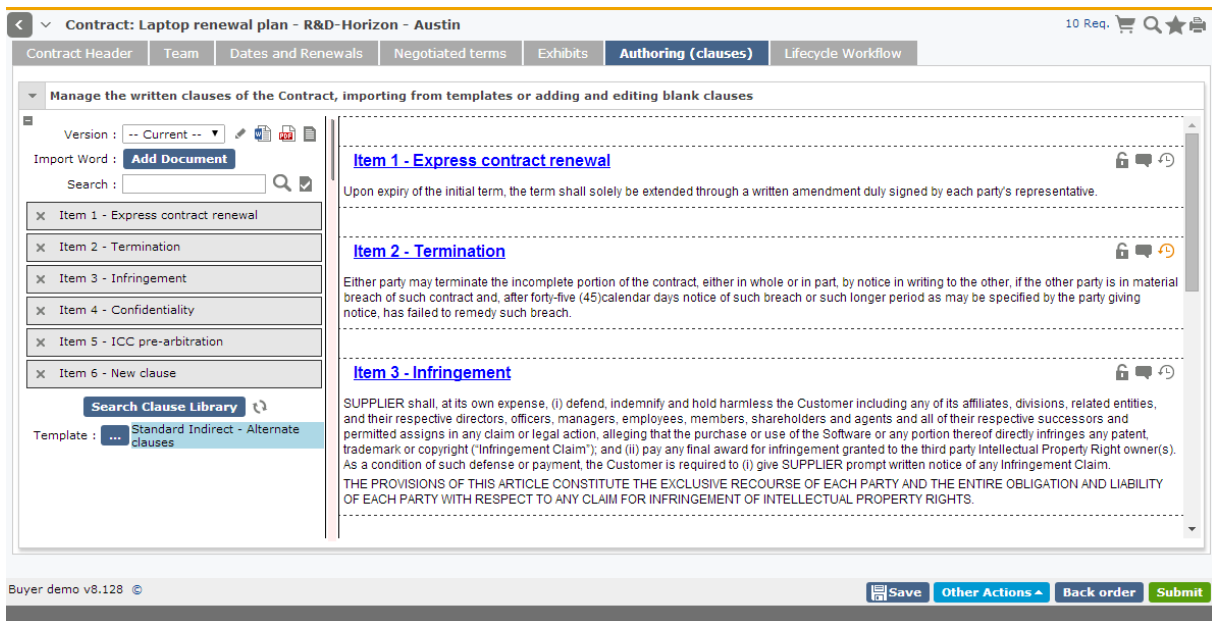
Code	Template label	Organization	Commodity	Contract type	Clauses	Status
TPL000006	Standard Indirect - Alternate clauses	Boston Canada Los Angeles Montreal New Orleans ...	Accessoires Accessories and devices Administrative expenses Advertiser Advertising in outlets ...	Amendment Master Agreement (buying) Pricing Agreements Scope of Work (buying)	6	Approval in progress

1 Result(s)

Close

The list of available templates displays in a popup window. By default, templates are filtered to match the organizational scope, purchasing scope, contract type and contract language as per selected in the *General information* tab of the contract record.

3. To select a template, click its selection icon . All the clauses included in the selected template will be imported into your document.



Contract: Laptop renewal plan - R&D-Horizon - Austin

Contract Header | Team | Dates and Renewals | Negotiated terms | Exhibits | **Authoring (clauses)** | Lifecycle Workflow

Manage the written clauses of the Contract, importing from templates or adding and editing blank clauses

Version: -- Current --

Import Word: **Add Document**

Search:

- Item 1 - Express contract renewal
- Item 2 - Termination
- Item 3 - Infringement
- Item 4 - Confidentiality
- Item 5 - ICC pre-arbitration
- Item 6 - New clause

Search Clause Library

Template: ... Standard Indirect - Alternate clauses

Item 1 - Express contract renewal

Upon expiry of the initial term, the term shall solely be extended through a written amendment duly signed by each party's representative.

Item 2 - Termination

Either party may terminate the incomplete portion of the contract, either in whole or in part, by notice in writing to the other, if the other party is in material breach of such contract and, after forty-five (45) calendar days notice of such breach or such longer period as may be specified by the party giving notice, has failed to remedy such breach.

Item 3 - Infringement


SUPPLIER shall, at its own expense, (i) defend, indemnify and hold harmless the Customer including any of its affiliates, divisions, related entities, and their respective directors, officers, managers, employees, members, shareholders and agents and all of their respective successors and permitted assigns in any claim or legal action, alleging that the purchase or use of the Software or any portion thereof directly infringes any patent, trademark or copyright ("Infringement Claim"); and (ii) pay any final award for infringement granted to the third party Intellectual Property Right owner(s). As a condition of such defense or payment, the Customer is required to (i) give SUPPLIER prompt written notice of any Infringement Claim. THE PROVISIONS OF THIS ARTICLE CONSTITUTE THE EXCLUSIVE RECOURSE OF EACH PARTY AND THE ENTIRE OBLIGATION AND LIABILITY OF EACH PARTY WITH RESPECT TO ANY CLAIM FOR INFRINGEMENT OF INTELLECTUAL PROPERTY RIGHTS.

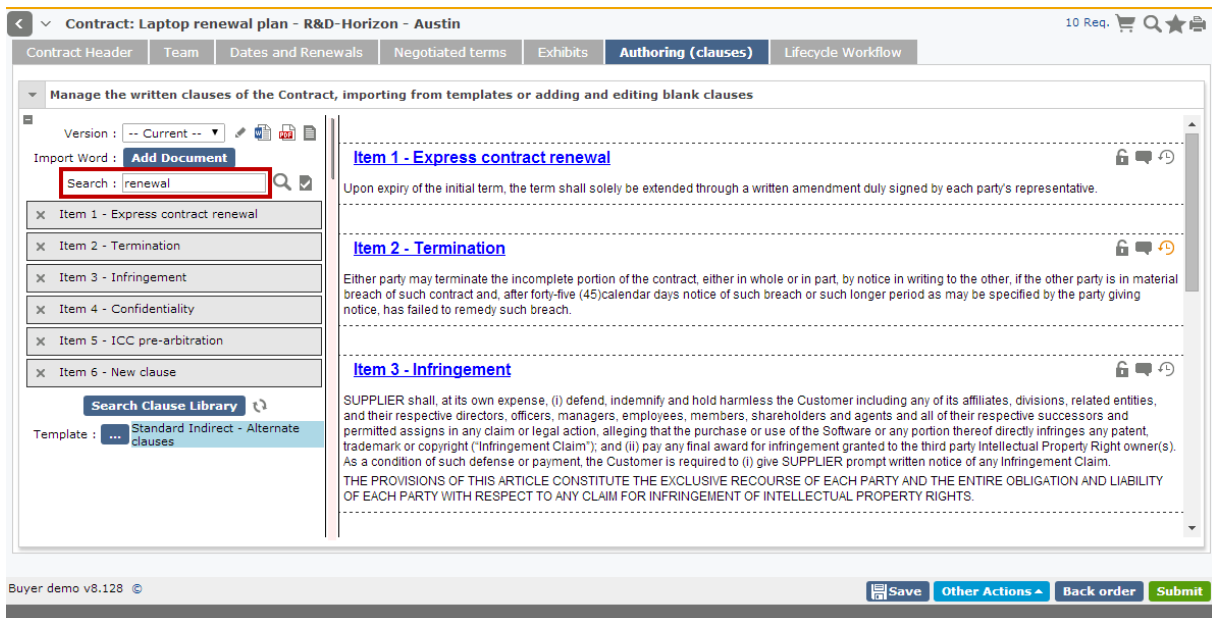
Buyer demo v8.128

Save **Other Actions** **Back order** **Submit**

If needed, the template associated with a document can be changed later on, but be aware that this will replace existing clauses with the clauses included in the new template.

Performing a full-text search in a document or template

To perform a full-text search, type the desired word or phrase in the **Search** entry box, and then click the  icon (or press Enter).



Contract: Laptop renewal plan - R&D-Horizon - Austin

Contract Header | Team | Dates and Renewals | Negotiated terms | Exhibits | **Authoring (clauses)** | Lifecycle Workflow

Manage the written clauses of the Contract, importing from templates or adding and editing blank clauses

Version: -- Current --

Import Word: **Add Document**

Search: **renewal**

- Item 1 - Express contract renewal
- Item 2 - Termination
- Item 3 - Infringement
- Item 4 - Confidentiality
- Item 5 - ICC pre-arbitration
- Item 6 - New clause

Search Clause Library

Template: ... Standard Indirect - Alternate clauses

Item 1 - Express contract renewal

Upon expiry of the initial term, the term shall solely be extended through a written amendment duly signed by each party's representative.

Item 2 - Termination

Either party may terminate the incomplete portion of the contract, either in whole or in part, by notice in writing to the other, if the other party is in material breach of such contract and, after forty-five (45) calendar days notice of such breach or such longer period as may be specified by the party giving notice, has failed to remedy such breach.

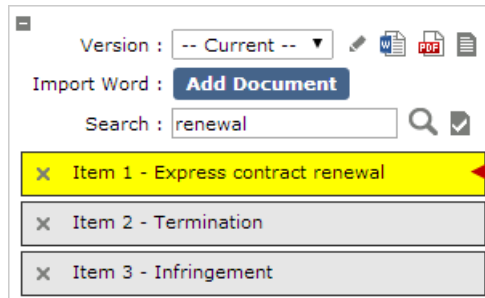
Item 3 - Infringement


SUPPLIER shall, at its own expense, (i) defend, indemnify and hold harmless the Customer including any of its affiliates, divisions, related entities, and their respective directors, officers, managers, employees, members, shareholders and agents and all of their respective successors and permitted assigns in any claim or legal action, alleging that the purchase or use of the Software or any portion thereof directly infringes any patent, trademark or copyright ("Infringement Claim"); and (ii) pay any final award for infringement granted to the third party Intellectual Property Right owner(s). As a condition of such defense or payment, the Customer is required to (i) give SUPPLIER prompt written notice of any Infringement Claim. THE PROVISIONS OF THIS ARTICLE CONSTITUTE THE EXCLUSIVE RECOURSE OF EACH PARTY AND THE ENTIRE OBLIGATION AND LIABILITY OF EACH PARTY WITH RESPECT TO ANY CLAIM FOR INFRINGEMENT OF INTELLECTUAL PROPERTY RIGHTS.

Buyer demo v8.128

Save **Other Actions** **Back order** **Submit**

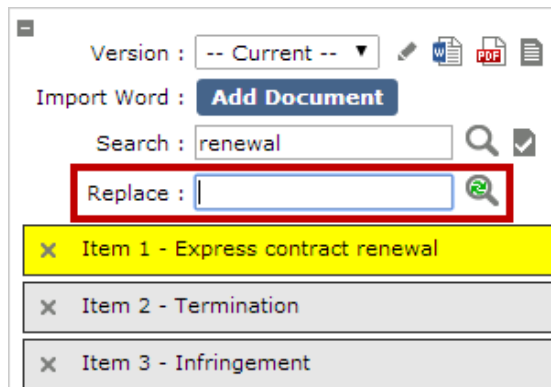
The application first searches the word or phrase in the clause list (left), then in the clause contents (right). It highlights the first occurrence in yellow.




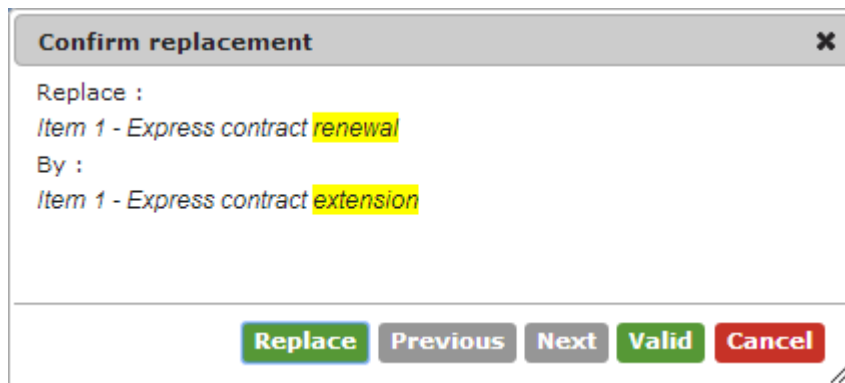
Click the  icon (or press Enter) again to display the next occurrence.

Replacing text in a document or in a template

1. To replace text, click on the *Search*  icon while holding the Ctrl key. The replacement zone will be displayed.



2. Specify the text to be searched for in the *Search* text box and the replacement text in the *Replace* text box.
3. To complete the replacement, click on the *Replace*  icon (or press Enter). A message asking you to confirm the replacement will be displayed:



Clauses

Definition

Clauses are reusable objects that serve as the 'building blocks' for creating a document or template.

The cover page, content table, and signature are considered clauses in their own right.

Clauses are initially created as part of a given document or template. Once created, they are stored in a Clause Library to allow for their reuse into other documents or templates. Clauses can be selected and assembled in the desired order.

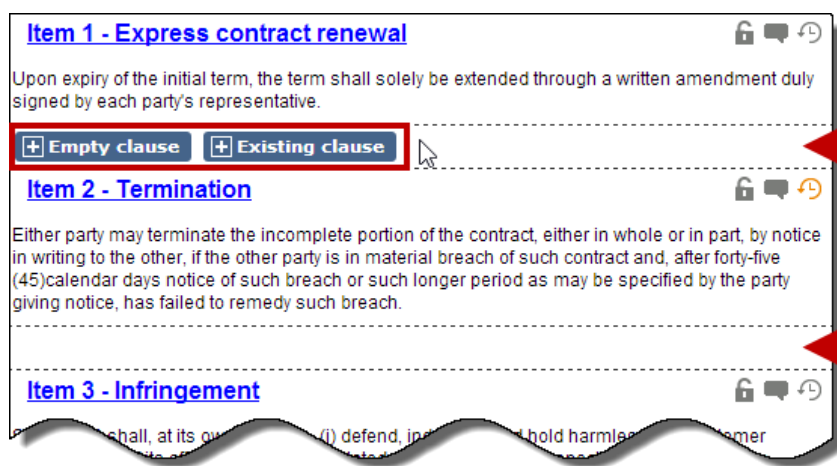
Creating clauses

Whether the document you are currently working on is associated to a template or not, you may insert clauses from the Clause Library or create new clauses.

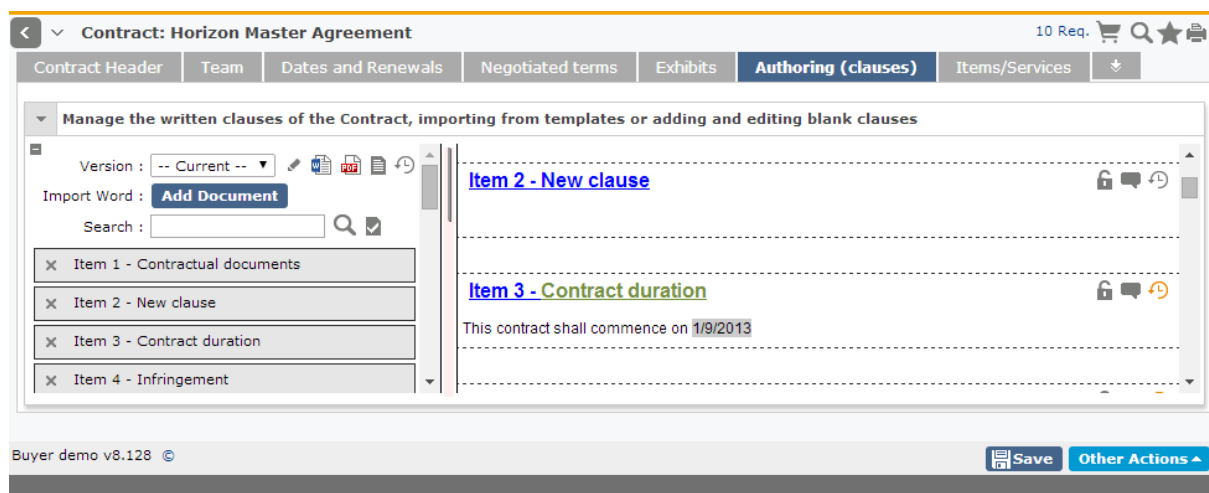
Inserting a new clause

You can add a new clause at the desired location within the document. To do so:

1. Hover your mouse cursor over the blank space that lies above and below each clause box in your document in order to display the following push buttons:




2. Click the **+ Empty clause** button. A message displays, prompting you to confirm your request.
3. Click **OK** to insert a new empty clause at the chosen location.



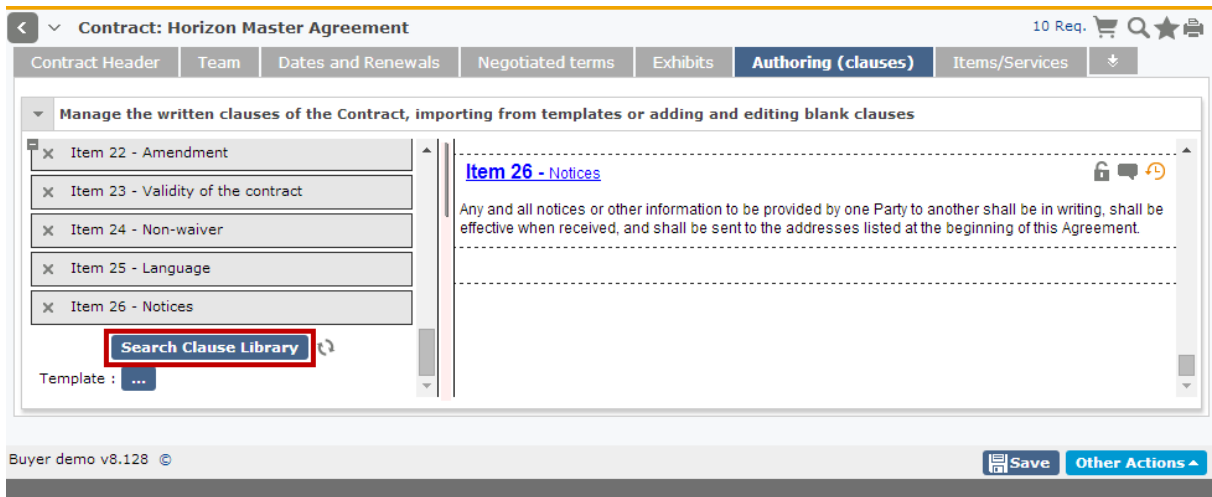
Inserting clauses from the Clause Library


You can add existing clauses in either of two ways:

- Add a single clause at the desired location within the document
- Add one or multiple clauses at the end of the document

To add a single clause at the desired location, proceed in the same way as described above for adding a new clause, but instead use the **+ Existing clause** button. The Clause Library displays. Select the clause to be added by clicking its selection icon .

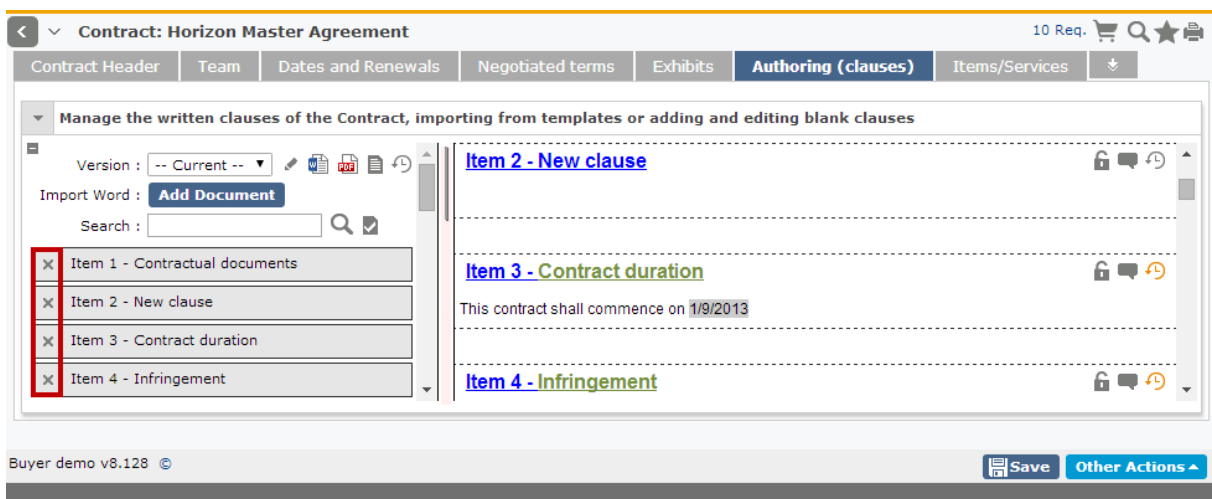
To add one or multiple clauses at the end of the document, click the **Search Clause Library** button located in the left part of the *Authoring (clauses)* tab.



The Clause Library displays. Select the clauses you wish to add by clicking their selection icon . When done, click the **Close** button. Selected clauses are added to your document; if the document is not empty, the selected clauses are appended at the end.

Removing a clause

To remove a clause, click its *Delete* icon  in the clause list, on the left part of the tab.

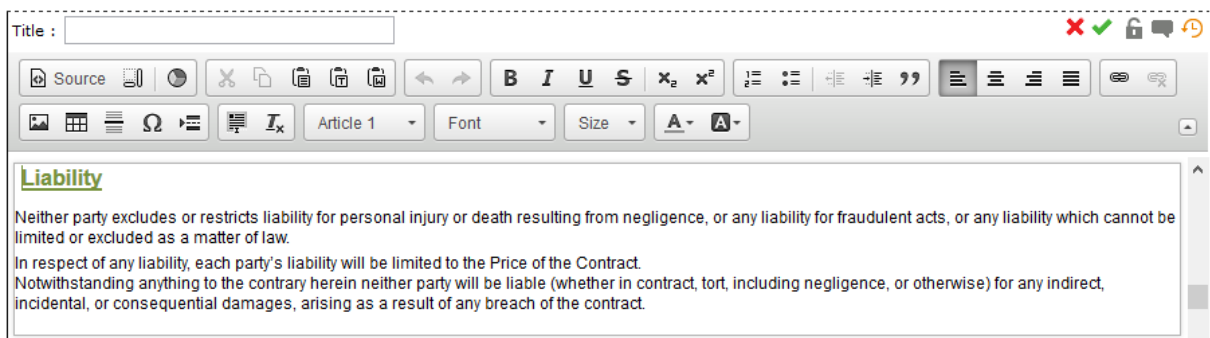


Remaining clauses are automatically renumbered.



Editing a clause

As a general rule, clicking on a clause will enter Edit Mode for the clause you clicked.

This enables you to enter text edits, select appropriate formatting, insert, modify or remove merge fields, and so forth.



When done, you may:

- Exit Edit Mode and save your edits by clicking  or clicking anywhere outside the clause box, or else pressing CTRL+S on your keyboard
- Exit Edit Mode and cancel your edits by clicking  or pressing the ESC key on your keyboard

Applying CSS styles

IVALUA BUYER offers a set of predefined styles that you can apply to clauses. The set of styles and their definition are the same across all documents and templates. They are defined during the configuration stage of the application and are not customizable by users (an engineer is necessary to implement changes). However, you can export a given document as a DOC file and change the styles in MS Word®, and then import it back into IVALUA BUYER: the new styles will be maintained but they will only apply to this document (see Importing clauses from MS Word, p.52).

In the Styles drop-down list, you will find two types of CSS styles: block styles and inline styles.

Structuring clause headings with block styles

A block style will apply the style to the entire HTML element in which the cursor resides – there is no need to highlight the text. Here, block styles are heading styles designed to define the structure of your document.

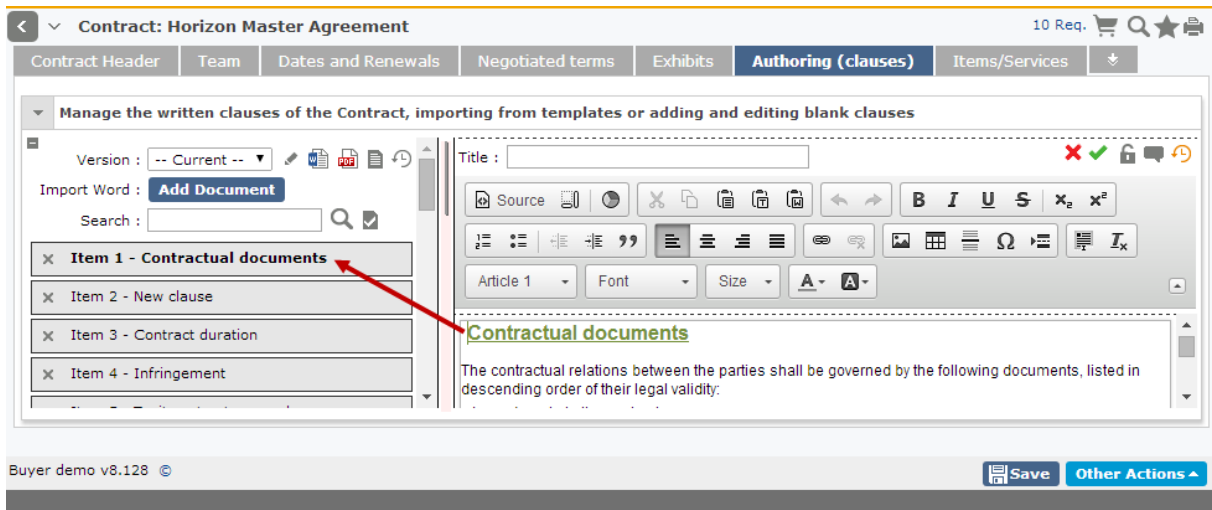
Formatting characters with inline styles

An inline style is a 'character' style that will only be applied to the text you have selected with the cursor.

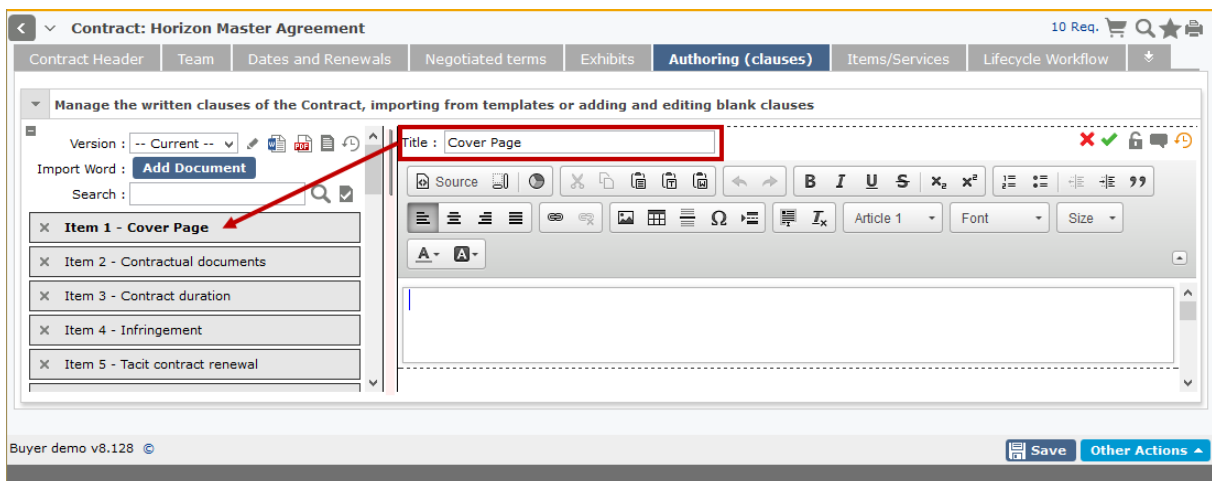
You will typically use it to redline or highlight text or make it stand out in various ways.

Managing clause headings

By default, the clause heading in the clause list on the left is determined based on the first block style heading in the clause content.



In cases where the clause does not contain any block style heading or you do not want it to show in the clause list, you may use the *Title* entry box to specify the heading as it should appear in the clause list.

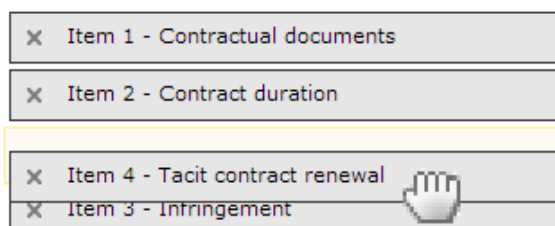


Splitting a clause

1. Locate the clause you want to split and enter Edit Mode by clicking anywhere in the clause box.
2. Right-click on the clause at the location where you want to split the clause, then select *Split clause* in the contextual menu that appears.


Ordering clauses

Clauses can be reordered with a simple drag-and-drop, which causes automatic renumbering of all clauses.



Clause comments

You can attach comments to clauses in documents (current version or saved version) and in templates.


To write a comment, use the icon  located in the upper right corner of the clause's frame.

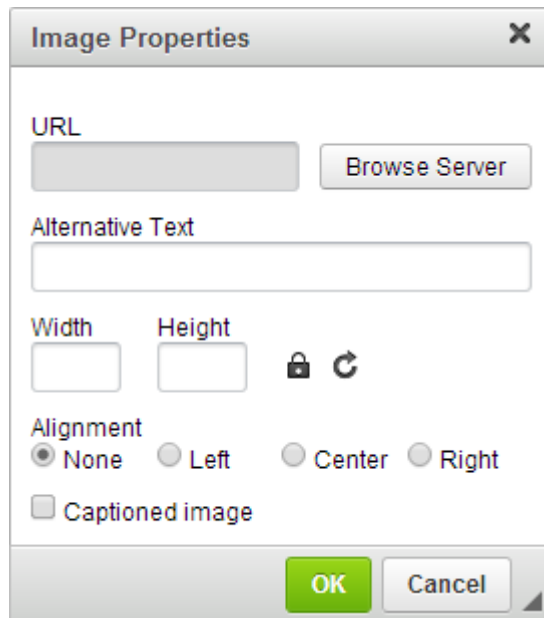
The system may signal the presence of comments attached to a clause in one of several ways, depending on configuration. There are 4 options:

- Default option: The presence of unread comments is indicated by the *Comments* icon turning orange, but their number is not shown
- Unread comments are indicated and their number is shown as well
- The presence of unread comments is not indicated and the number of existing comment is not shown
- The presence of unread comments is not indicated, but the number of existing comment is shown

Inserting images within clauses

You can insert images in document's or template's clauses.

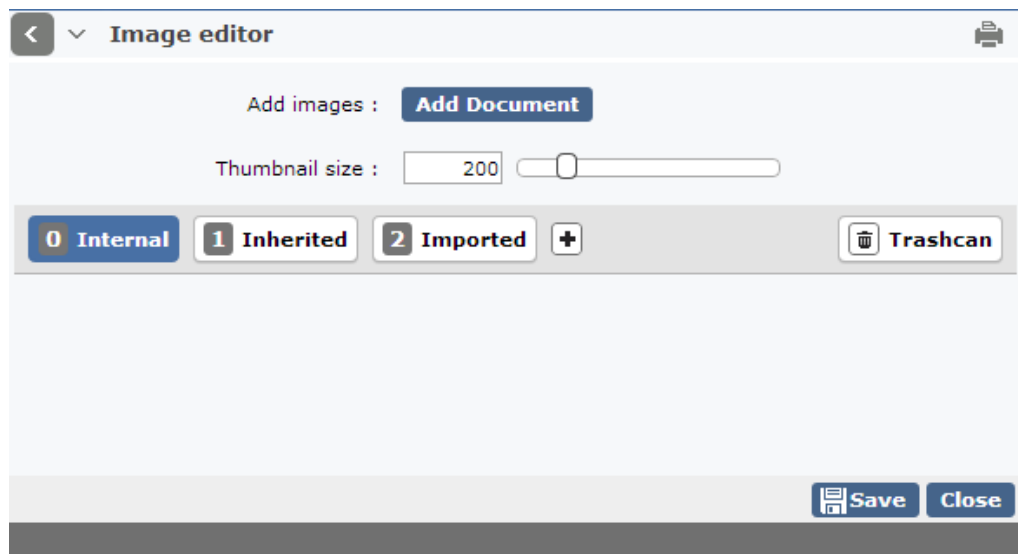
1. Click the clause in which you want to insert an image. The clause will open in Edit mode with its tool bar.
2. Position your mouse cursor where you the image to be inserted.
3. Click the *Image* icon  in the toolbar.
The *Image Properties* window will display.



The **Image Properties** dialog box contains the following fields and controls:

- URL**: A text input field with a **Browse Server** button to its right.
- Alternative Text**: A text input field.
- Width** and **Height**: Two text input fields. To their right are a lock icon and a refresh icon.
- Alignment**: Four radio buttons labeled **None** (selected), **Left**, **Center**, and **Right**.
- Captioned image**: A checkbox.
- OK** and **Cancel**: Two buttons at the bottom right.

4. Click the **Browse server** button. The *Image editor* window will display.



The **Image editor** window displays the following elements:

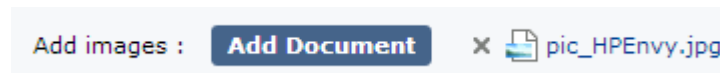
- Navigation**: A back arrow and a dropdown menu.
- Actions**: An **Add images :** label followed by an **Add Document** button.
- Thumbnail size**: A label followed by a text input field containing '200' and a slider control.
- Image Categories**: Three buttons labeled **0 Internal**, **1 Inherited**, and **2 Imported**, followed by a plus icon.
- Trashcan**: A button with a trash icon and the label **Trashcan**.
- Footer**: **Save** and **Close** buttons.

This window distinguishes between 3 categories of images:

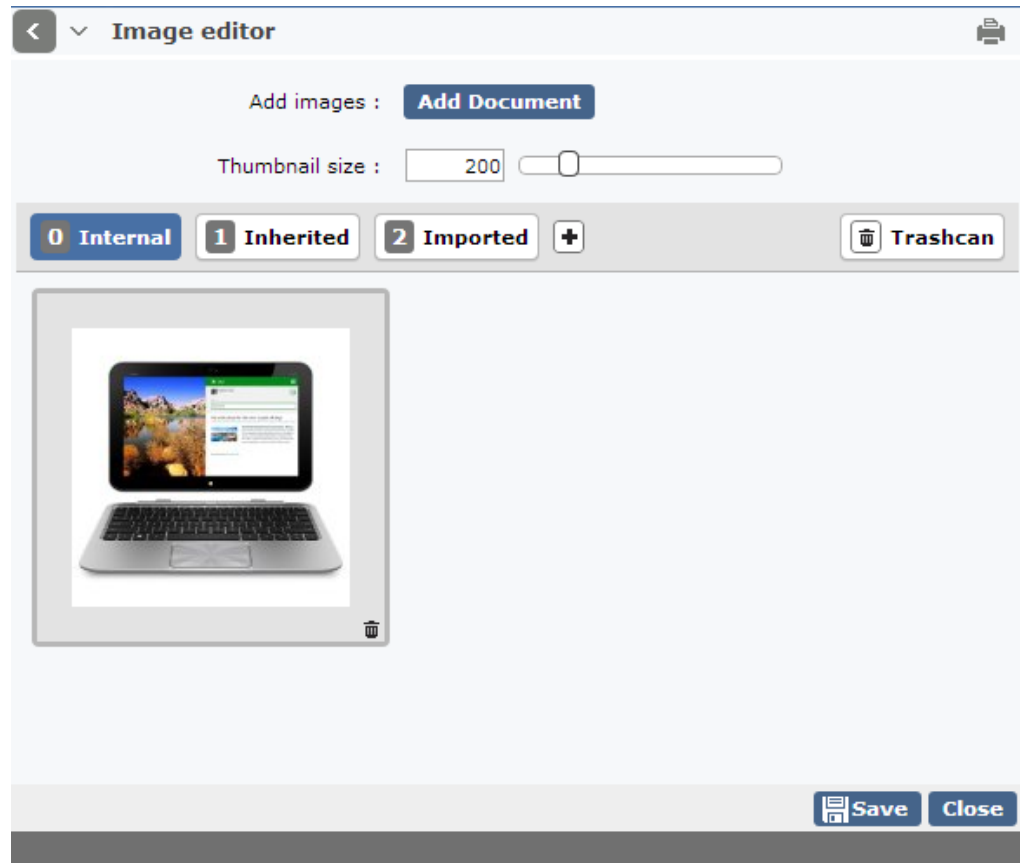
- **Internal**: images that were added directly from the *Authoring* tab and are linked to the current document
- **Inherited**: images inherited from the template, or from the main contract in the case of a contract amendment
- **Imported**: images added through a Word import

Let's add an internal image, for instance.

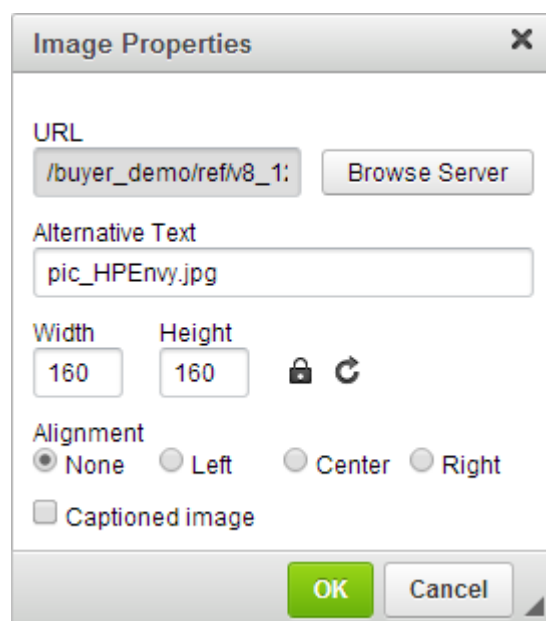
5. Click the **Add Documents** button, select an image and click **Open**. The name of the selected image file will display to the right of the **Add Documents** button.



6. Click the **Save** button. The added image is now available for inserting into the clause.



7. Click the image thumbnail.
The image properties will display.



You can modify these properties, referring to the table below for explanations.

Property	Description
URL	URL of the selected image on the server
Alternative text	Text to display in replacement of the image if it is not available (by default, name of the image file)
Width / Height	Image width and height in pixels You can resize the image while maintaining its proportions (🔒) or decoupling width and height (🔓). Use ↺ to revert to the original image size.
Alignment	Apply the selected alignment property to the image
Captioned image	Inserts an editable text box associated with the image

- Click **OK** to insert the image in the clause.
To access the properties of an image you've already inserted, double-click it.

Exporting clauses as a DOC or PDF file

To export a contract document or a contract template as a DOC or PDF File, use the Word or PDF icons in the left pane.

The screenshot shows the 'Contract: Horizon Master Agreement' interface. The top navigation bar includes tabs for 'Contract Header', 'Team', 'Dates and Renewals', 'Negotiated terms', 'Exhibits', 'Authoring (clauses)', and 'Items/Services'. The 'Authoring (clauses)' tab is active. Below the navigation bar, there's a section titled 'Manage the written clauses of the Contract, importing from templates or adding and editing blank clauses'. On the left, there's a list of clauses: 'Item 1 - Contractual documents', 'Item 2 - Contract duration', 'Item 3 - Tacit contract renewal', 'Item 4 - Liability', 'Item 5 - Infringement', and 'Item 6 - Confidentiality'. 'Item 1 - Contractual documents' is selected. The right pane shows the content of 'Item 1 - Contractual documents', which includes a list of documents and a paragraph about the contractual relationship. The bottom of the interface has a 'Buyer demo v8.128' label and 'Save' and 'Other Actions' buttons.

Importing clauses from MS Word

Presentation

As we've seen before, a clause set document can be exported as a DOC file.

You have the ability to open the exported file in MS Word®, to edit it and then import it back into the IVALUA BUYER authoring tool while maintaining your edits. Imports must be performed on the current version as other versions are read-only.

Importing a clause set in DOC format

Click the **Add Document** associated with the *Import Word* field.

The screenshot shows the IVALUA BUYER authoring tool interface. The top navigation bar includes tabs for 'Contract Header', 'Team', 'Dates and Renewals', 'Negotiated terms', 'Exhibits', 'Authoring (clauses)', 'Items/Services', and 'Lifecycle Workflow'. The 'Authoring (clauses)' tab is currently selected. Below the navigation bar, there is a section titled 'Manage the written clauses of the Contract, importing from templates or adding and editing blank clauses'. On the left side of this section, there is a list of clause items, each with a search icon and a text input field. The first item, 'Item 1 - Contractual documents', is selected. The main area of the interface displays the text of the selected clause. The text includes a list of documents and a search for 'Add Document'. The text is as follows:

Item 1 - Contractual documents

The contractual relations between the parties shall be governed by the following documents, listed in descending order of their legal validity:

- Amendments to the contract,
- The contract and the following exhibits :
 - o Exhibit 1 : <to be defined>

In case of contradiction or divergence between these documents, they prevail according to their descending order.

The contractual documents listed above constitute the entirety of the parties' agreement related to their subject matter and supersede any declaration, negotiation, commitment, communication, whether oral or written concluded between the parties. The contract shall only be modified through an amendment.

The parties acknowledge and agree that none of their general terms and conditions used by each of them for business purposes shall apply to the contract.

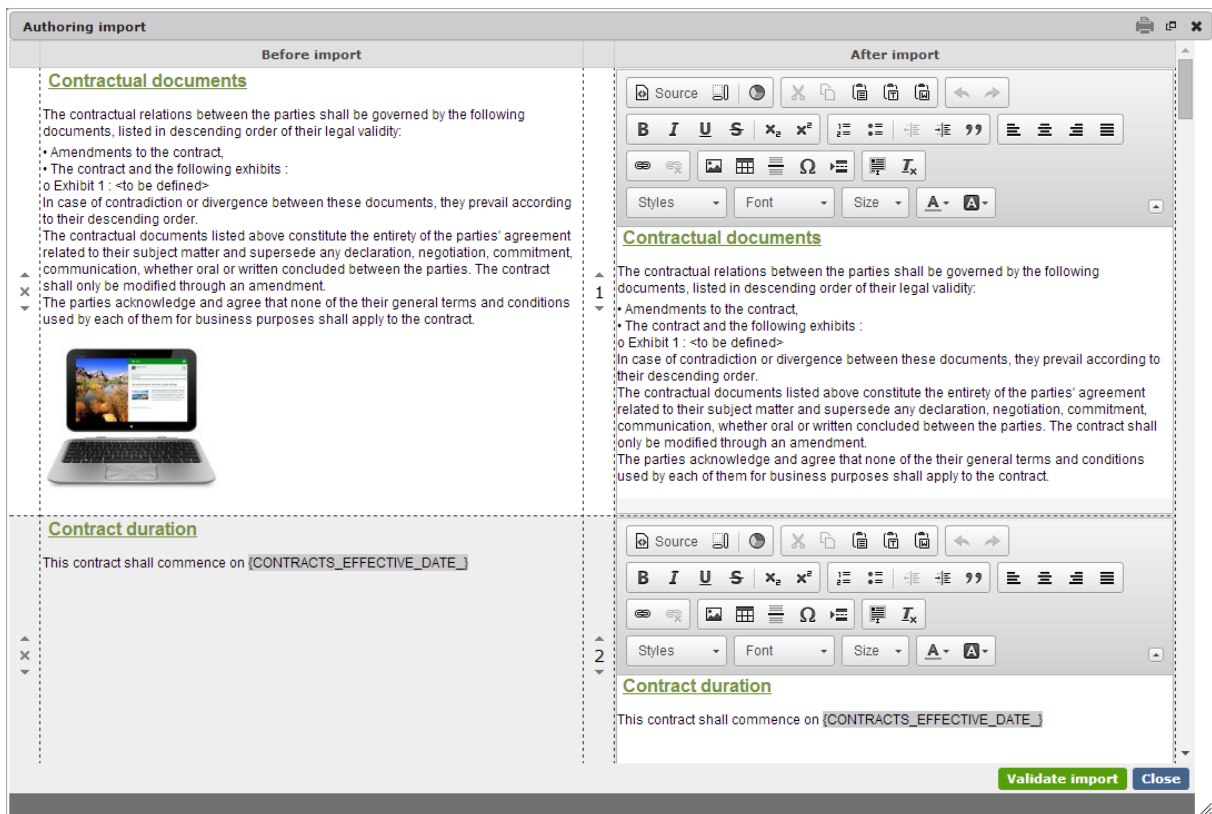
Item 2 - Contract duration

This contract shall commence on 1/9/2014

Item 3 - Infringement

SUPPLIER shall, at its own expense, (i) defend, indemnify and hold harmless the Customer including any of its affiliates, divisions, related entities, and their respective directors, officers, managers, employees, members, shareholders and agents and all of their respective successors and permitted assigns in any claim or legal action, alleging that the purchase or use of the Software or any portion thereof directly infringes any patent, trademark or copyright ("Infringement Claim"); and (ii) pay any final award for infringement granted to the third party Intellectual Property Right owner(s). As a condition of such defense or payment, the Customer is required to (i) give SUPPLIER prompt written notice of any Infringement Claim; (ii) provide Ivalua with the sole control of the defense and/or settlement of the Infringement Claim; provided that, if any settlement requires an affirmative obligation of, results in any ongoing liability to or prejudices or detrimentally impacts, Customer in any way and such obligation, liability, prejudice or impact can reasonably be expected to be material then such settlement shall require Customer's written consent (not to be unreasonably

In the window that will display, select the file to import, and click **Open**. An import preparation window will display.



The window presents a 2-column clause table, with the current version on the left and the version to import on the right.

Automatic mapping of clauses

The uploaded document is split into clauses and the system attempts to match import clauses and current clauses.

The splitting of the imported document into clauses occurs on paragraphs with heading styles (Heading 1, Heading 2 and Heading 3): Heading 1 is used for main clauses and Heading 2 and 3 allow for 2 levels of indented sub-clauses.

Imported clauses are matched with existing clauses thanks to a bookmark inserted between the title prefix and the title. In the case of exported paragraphs that are reimported without title, the splitting point will be inferred from the presence of this bookmark at the beginning of the clause.

Alternative mapping method

Your system can be configured so that clauses are matched based on their title or on the first words of the contents.

When this option is enabled, the system attempts to match import clauses and current clauses based:

- first, on the clause title, if present
- or, if there is no title or the title has been changed, on the first 100 words of the clause content

This is handy when importing a clause set on a contract amendment, for instance, where most clauses are identical to those of the main contract, only with different IDs.

Automatic mapping can be unsuccessful; the import preparation window gives you the opportunity to make adjustments before confirming your import.

Editing the content of import clauses

In each clause, you'll find a tool bar allowing you to edit text and its layout, to insert images, tables or special characters, to apply styles, and more.

You can also add, delete or modify merge fields. However, be aware that edits to the values of merge fields will be ignored.

Tables of contents and page breaks will imported correctly.

Changing clause mappings

When clauses included both in the current document and in the import file are not correctly matched in the import preparation window, you have the ability to adjust pairs of clauses using the down- and up-pointing arrows associated with each clause.

Confirming or canceling the import

Click the **Validate import** button in the action bar to import clauses with any edits entered in this window.

Click **Close** to delete the uploaded file and abort the import.

Important points

In MS Word, you can modify the clauses' layout by applying styles (in particular, title styles Heading 1, Heading 2, Heading 3, etc.). These layouts will be maintained in the imported document. Note, however, that these new layouts will not replace the application's predefined styles: they are imported as formatting and not as styles, and only apply to the imported document.

Some elements or changes brought in MS Word will ignored on import:

- Headers and footers

The page header and footer are decoupled from the content. They can be attached to a document version and applied when exporting it in PDF or DOC format (see *Enhancing a document version with a page header and footer template*, p.58).

- Title prefixes and numbering

Titles are automatically numbered and prefixed in the application. Edits brought to these prefixes and numbering in MS Word will be ignored. However, if you reorder clauses in MS Word, clause numbering will be updated accordingly in the *Authoring* tab.

The default prefix (*Item*) can be customized by the Administrator.

Merge Fields

Introduction to merge fields

A merge field is a placeholder for text that you insert into a clause. Each placeholder is linked to a data source, which allows them to be dynamically replaced with the data that is relevant to your particular object instance (contract, for instance).

Using merge fields ensures that the corresponding data will be automatically updated to fit multiple object instances or to reflect any changes brought to the data source.

The merge field picker lets you choose from a list of database fields (list of available fields is customizable by the Administrator using queries). An additional merge field is available for inserting a list of included clauses (table of contents): {SUMMARY}.

When inserted into a clause, a gray highlighting makes placeholders stand out.

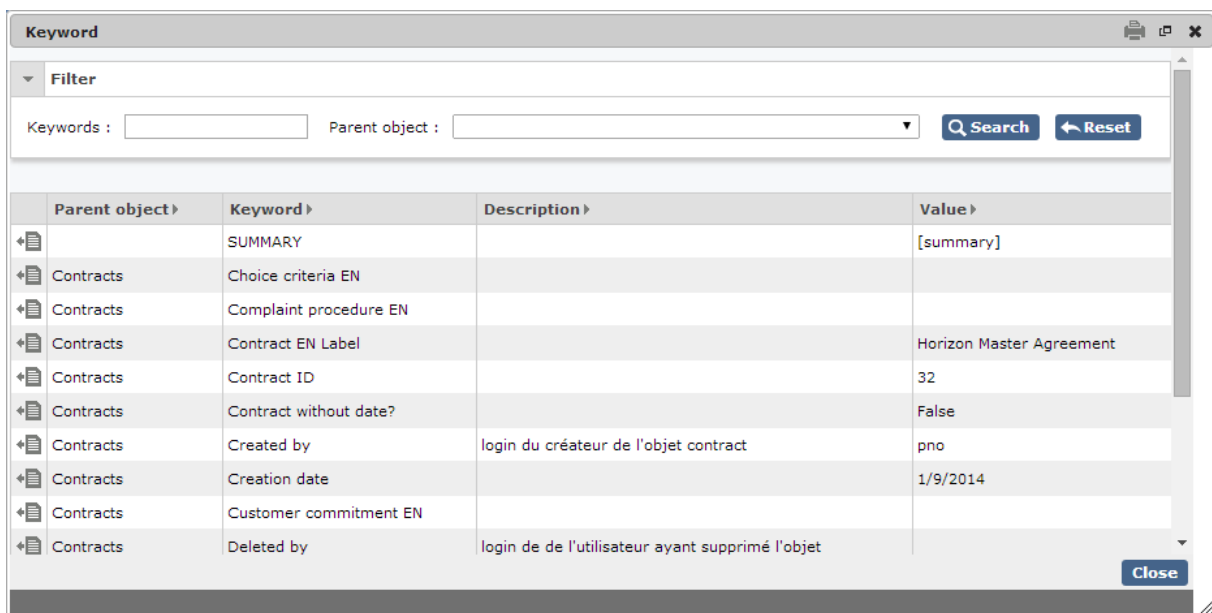
In a document, placeholders appear as values, except in Edit Mode where they appear as field codes.

In a template, placeholders always appear as field codes since a template is not linked to a particular instance of an object.

You can format, copy, move, or delete a merge field.

Inserting a merge field

1. Click the clause you want to add a merge field to, so as to enter Edit Mode.
2. Do a right-click where you want to insert the merge field, and then select *Add a merge field* in the contextual menu that pops up.
The *Keyword* window displays.




The screenshot shows a window titled "Keyword" with a search filter section and a table of available merge fields.

Filter section:

- Keywords :
- Parent object :
-
-

Table of merge fields:

Parent object	Keyword	Description	Value
	SUMMARY		[summary]
Contracts	Choice criteria EN		
Contracts	Complaint procedure EN		
Contracts	Contract EN Label		Horizon Master Agreement
Contracts	Contract ID		32
Contracts	Contract without date?		False
Contracts	Created by	login du créateur de l'objet contract	pno
Contracts	Creation date		1/9/2014
Contracts	Customer commitment EN		
Contracts	Deleted by	login de de l'utilisateur ayant supprimé l'objet	

3. Choose a merge field by clicking its selection icon .
- The selected merge field is placed at the point of insertion in the clause content.
- Please note that your administrator can add other merge fields to this list.

Editing a merge field

To remove a merge field from a document, use one of two methods:

- Right-click the merge field and select *Edit merge field* in the contextual menu that pops up.
- Double-click the merge field.

Deleting a merge field

To remove a merge field from a contract document, use one of two methods:

- Right-click the merge field and select *Delete merge field* in the contextual menu that pops up.
- Select the merge field, and then press the DEL key on your keyboard.

Clause Revisions & Document Versions

Introduction to clause revisions, change history, and document versions management


IVALUA BUYER offers advanced document management capabilities that enable users to track the history of changes made to each clause, as well as to maintain and compare versions of the document.


A first level of change tracking is achieved through the automatic creation of a new clause revision whenever you save edits to a clause. Revisions of a clause are stored in the Clause History.

Document versions span the whole document. A new document version is created on demand whenever you wish to capture a snapshot of the current particular assembly of clause revisions. Document versions are read-only except for the current version.

You may track changes at version level by comparing two versions.

Viewing the change history of a clause

To display the change history of a clause, click the *History* icon  associated with the desired clause.

Note: Clauses with multiple revisions are indicated by an orange *History* icon .

Item 1 - Express contract renewal

Upon expiry of the initial term, the term shall solely be extended through a written amendment duly signed by each party's representative.

The Clause history displays.

Clause history			
<div><div>Filter</div><div>Keywords : <input type="text"/></div><div>Revision between : <input type="text"/></div><div>Version between : -- Current --</div><div>Q Search Reset</div><div>Merge data : <input checked="" type="checkbox"/></div><div>And : <input type="text"/></div><div>And : -- Current --</div></div>			
Version	Date	Author	Revision
	7/29/2014	DE A	<div>R001193</div> <div><u>Tacit contract renewal</u></div> <div>Upon expiry of the initial term, the term shall be automatically extended for successive 24 months.</div>
	7/29/2014	DE A	<div>R001192</div> <div><u>Tacit contract renewal</u></div> <div>Upon expiry of the initial term, the term shall be automatically extended for successive 24 <u>months</u>.</div>
V3 - Signed contract	7/24/2014	DE A	<div>R001149</div> <div><u>Tacit contract renewal</u></div> <div>Upon expiry of the initial term, the term shall be automatically extended for successive 12</div>


Deleted text appears as red strikethrough characters, while inserted text appears as blue underlined characters.

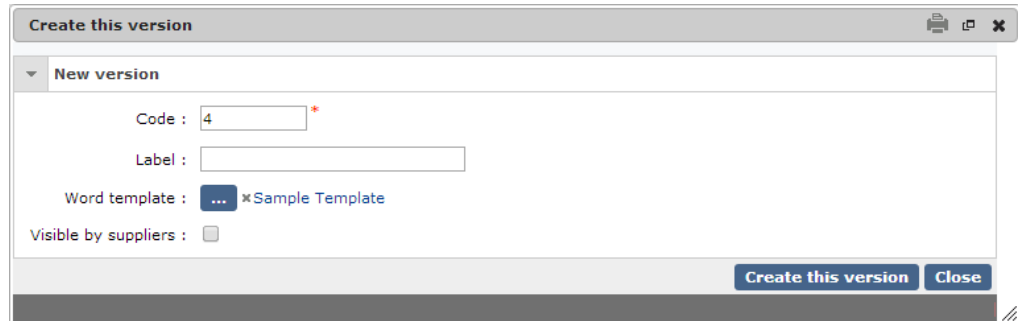
You may specify a range of revisions and/or a range of versions.

The *Merge data* option toggles the display of merge fields as codes (disabled) or as values (enabled). When enabled, this option will show changes in values as well.

Creating a document version

Once you have put together a first draft of your document, you have the ability to create a version, which is a snapshot of the current assembly of clause revisions.


1. To create a new version of the document, click the icon  in the left pane. The *New version* window displays.



The 'Create this version' dialog box is shown. It has a title bar with a close button. Below the title bar is a section labeled 'New version'. Inside this section, there are four fields: 'Code' with the value '4' and a red asterisk, 'Label' which is empty, 'Word template' with a dropdown menu showing 'Sample Template', and 'Visible by suppliers' with an unchecked checkbox. At the bottom right of the dialog are two buttons: 'Create this version' and 'Close'.

2. The version code is prepopulated with an auto incremented number. You may change it to match your preferred numbering scheme.
3. You may also give it a name (*Label*).
4. Select the page header/footer template to apply to this document version (see *Enhancing a document version with a page header and footer template*, p.58).
5. Finally, you need to decide whether the supplier will have access to this version of the contract document. For further information on supplier collaboration towards document authoring, see page 63.
6. Click the Create this version button.
The version is created and becomes read-only. It can be accessed via the *Version* drop-down list in the left pane.

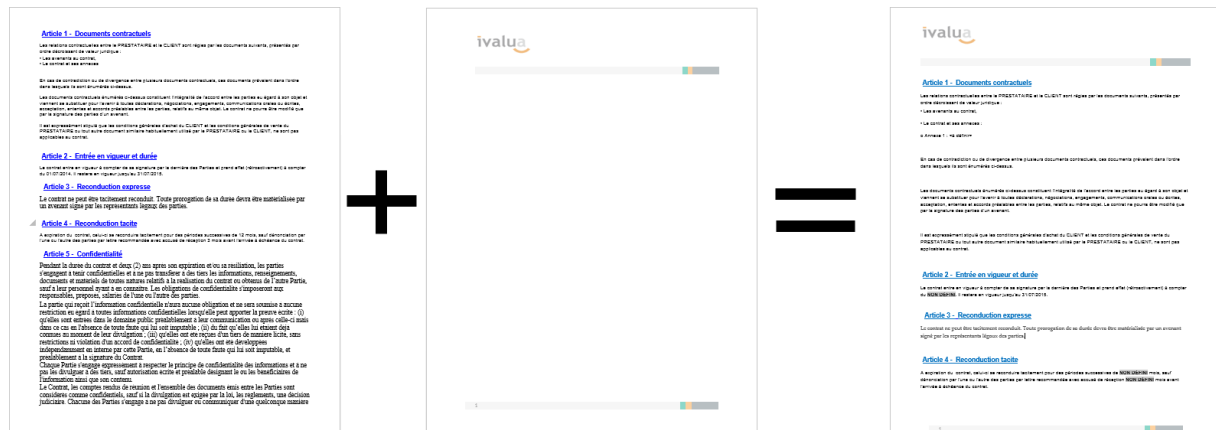


The *Edit* icon  placed to the right of the *Version* drop-down list lets you modify the version attributes (code, label, and supplier access).


Enhancing a document version with a page header and footer template

When creating or editing a document version, you can tie it to a page header and footer template. When you will download this version in DOC or PDF format, the document will be enhanced with the page header/footer of the selected template.

The header and footer template you want to use must first be saved in the content management module (create a document with the *[Template] Authoring* type and add the Word document that contains the header/footer as the content's attached file). Any user with content repository authorization can create and edit header/footer templates.



Comparing two versions of a contract document

To compare two versions of a document or template, click the *Compare versions* icon .

The screenshot shows the 'Contract: Horizon Master Agreement' interface. The 'Authoring (clauses)' tab is selected. The 'Manage the written clauses of the Contract, importing from templates or adding and editing blank clauses' section is visible. The 'Version' dropdown is set to 'Current'. The 'Import Word' button is highlighted. The 'Search' field is empty. The 'Item 2 - Contract duration' is selected. The 'Compare versions' icon is highlighted in the top right corner. The 'Buyer demo v8.128' version is displayed at the bottom left. The 'Save' and 'Other Actions' buttons are at the bottom right.

The *Compare versions* window displays.

The 2 *Version* drop-down lists in the upper part of the window let you select the versions you want to compare.

Available options are:

- **Show only differences (incl. Format changes):** identical clauses will not be displayed (enabled by default)
- **Show only clauses with text differences:** only clauses with text modifications will be displayed, format changes will be ignored.
- The **Show merged meta-data** option toggles the display of merge fields as codes (disabled) or as values (enabled). When enabled, this option will show changes in values as well.
 - ✓ With *Show merged meta-data* enabled:

Contract duration

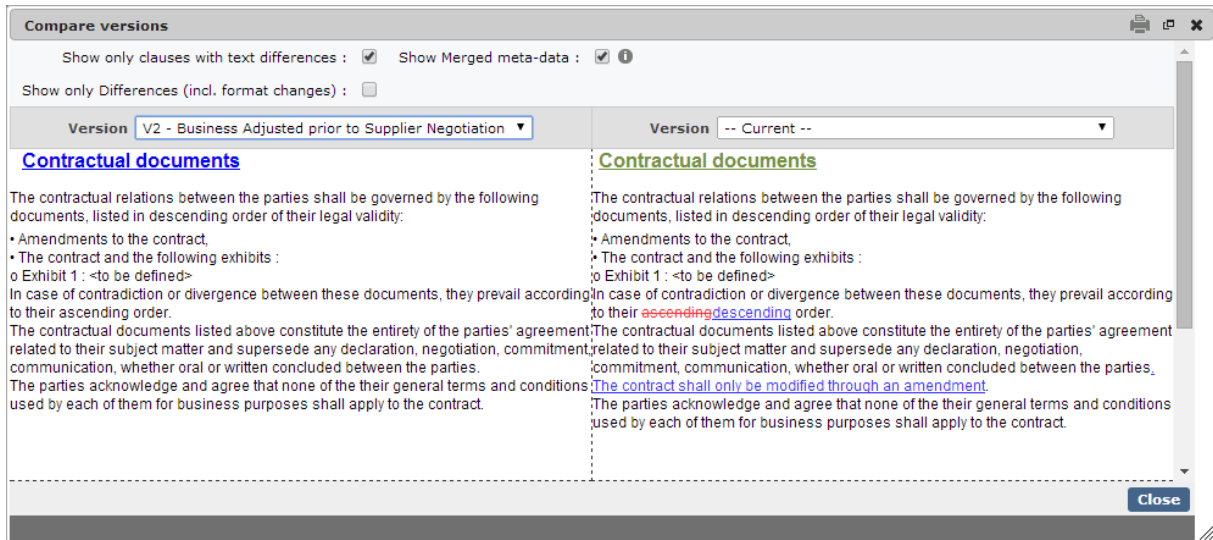
This contract shall commence on ~~16/04/2014~~18/01/2011 and shall continue for a period of ~~xxxx~~12 years-months.

✓ With *Show merged meta-data* disabled:

Contract duration

This contract shall commence on {CONTRACTS_EFFECTIVE_DATE_} and shall continue for a period of ~~xxxx~~12 years-months.

Change tracking results may vary depending on whether the *Merge data* option is enable or not. Indeed 2 clauses may be identical if merge fields are displayed as codes, while they can be different when comparing the values of these fields, and conversely.




Detected changes will be indicated in the most recent version, whether it is displayed on the left or on the right side.

Deleted text appears as red strikethrough characters, while inserted text appears as blue underlined characters.

Marking clauses as read

In order to help you easily identify clauses that have been modified by other contributors, the system makes a visual distinction between read clauses (white background) and unread clauses (blue background).

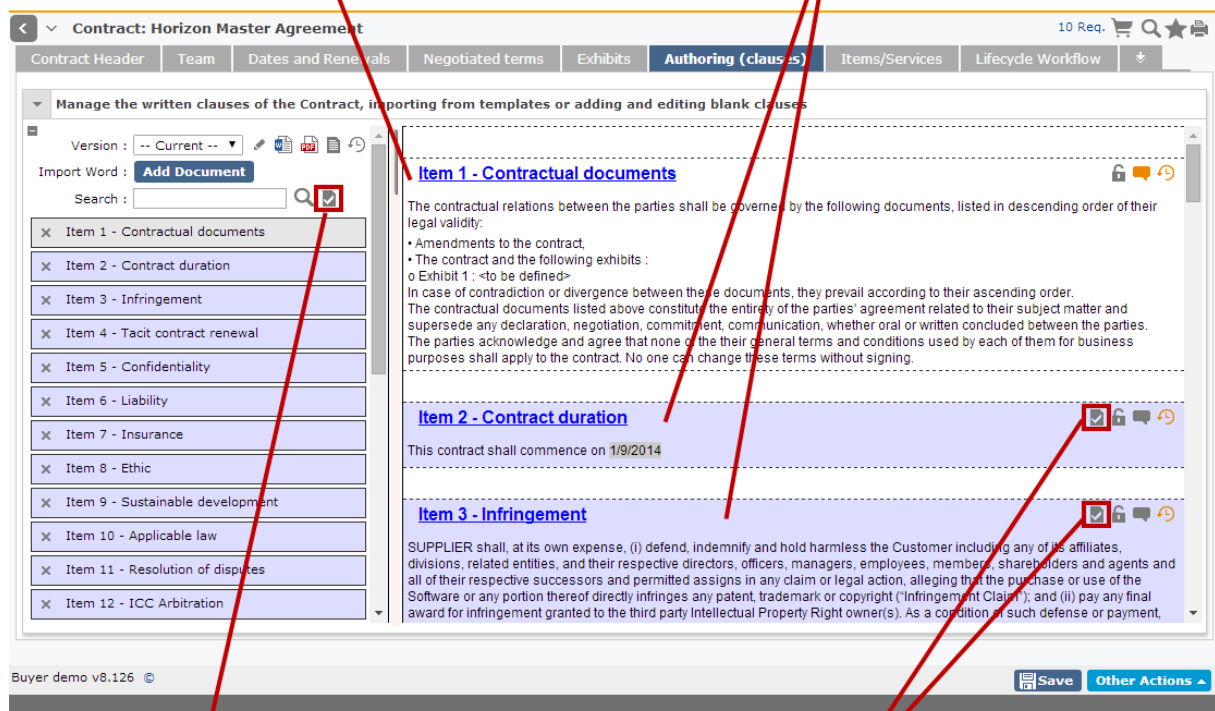
Any clause creation/modification will mark it as read for the user who performs the action, including in the case of massive creation of clauses via the selection of a template.

You can mark an unread clause as read using its *Mark as read* icon .

The same icon, also available in the left pane (next to the search entry box) will mark all clauses as read.

Read clause (white background)

Unread clause (blue background)



Mark the whole document as read

Mark the clause as read

Collaborative Work

Resolving concurrency issues

IVALUA BUYER allows concurrent editing of clauses.

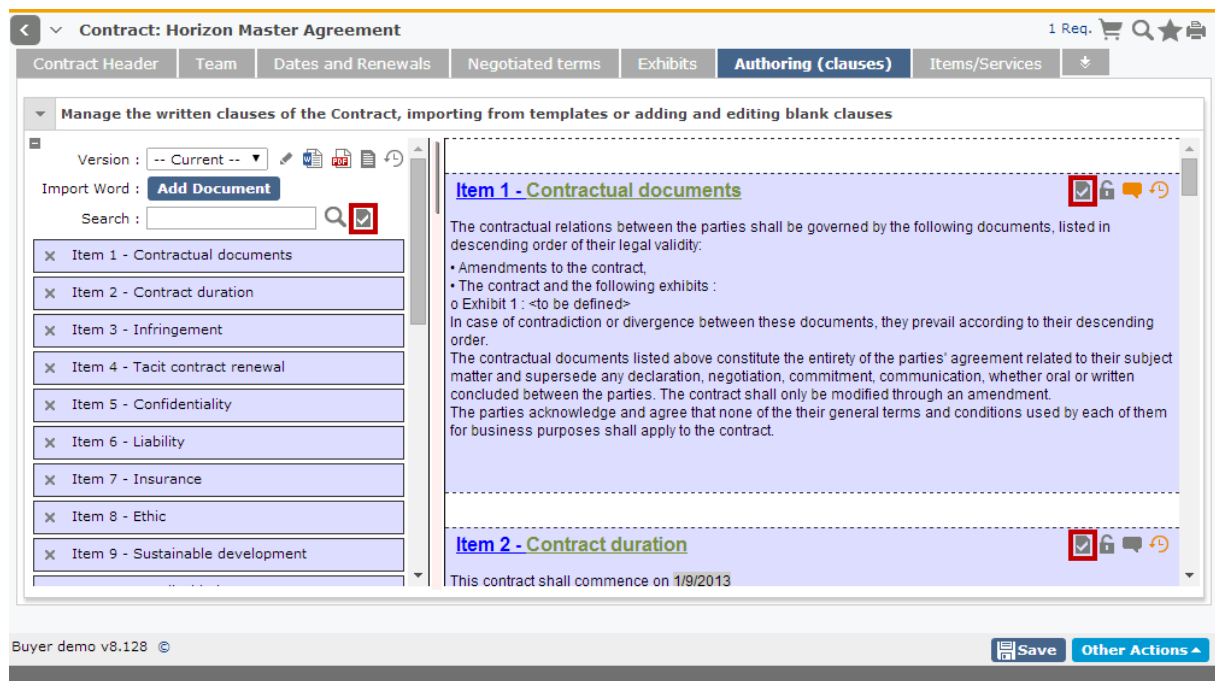
When multiple users edit the same clause at the same time, conflicts may arise if they both attempt to save their modifications. The following sequence of events describes how IVALUA BUYER will handle concurrency issues:

1. User A opens Clause X for editing. It has a revision number of 100.
2. User B opens the same Clause X. It has a revision number of 100.
At this point both users see the same data on their screens.
3. User A submits their changes to the database successfully. The revision number for Clause X is automatically incremented to 101.
4. When User B submits their changes, this time the system will detect that the submitted clause has a revision number (100) that is earlier than the most recent update (101). In such a case, the system will reject User B's update and display a notification that the clause changed.

Unable to revise the clause
Please re-synchronize your writing page

User B thus gets a chance to reconcile any conflicts manually by applying the following steps: copy the rejected changes, click the *Re-synchronize* icon (in the left pane) to obtain the most recent revision of the clause, paste the rejected changes in the new clause revision, and finally resubmit their changes.

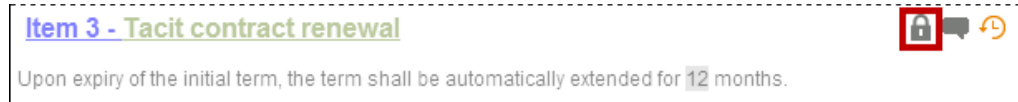
When you synchronize with the most recent revision, the clauses are highlighted in blue and *Mark as read* icons become available both in the left pane (*Mark all as read*) and in each clause box (*Mark as read*).



Locking / Unlocking Clauses

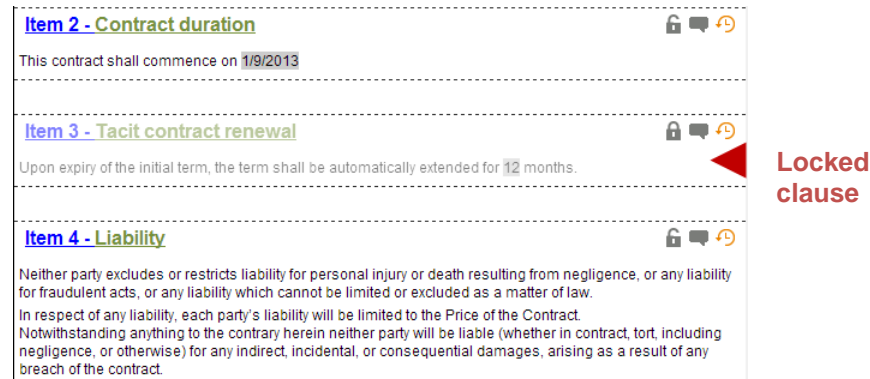
Locking a clause

1. Click the *Lock/Unlock Toggle* icon  associated with the clause you wish to lock.




A message displays, prompting you to confirm your request.


2. Click **OK** to lock the clause. Locked clauses are grayed out. Clicking the clause does not toggle to Edit Mode.

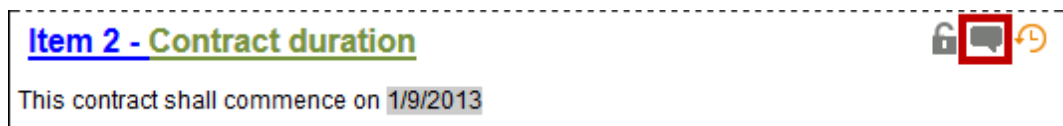


Unlocking a locked clause

1. To unlock a clause, click its *Lock/Unlock Toggle* icon . A message displays, prompting you to confirm your request.
2. Click **OK** to unlock the clause. The clause can now be edited.

Attaching comments to a clause

You may add comments to a clause by using the *Comment* icon .



When comments are associated with a clause, its *Comment* icon turns to red.

Supplier collaboration

For some documents, it can be beneficial to have suppliers contribute toward authoring (contracts, for instance).

This capability has to be enabled at version level. For further information on how to open supplier access to a document version, see *Creating a document version*, page 57.

Supplier's scope of action

Access to these features is ruled by various authorizations that must be assigned to the Supplier profile in order to enable them to perform the corresponding operations:

- CTN - Comment clauses (auth_ctn_clause_blog)
- CTN - View clauses (auth_ctn_clause_view)
- CTN - Create clauses (auth_ctn_clause_create)
- CTN - Edit clauses (auth_ctn_clause_edit)
- CTN - Delete clauses (auth_ctn_clause_delete)
- CTN - Lock clauses (auth_ctn_clause_lock)

Current version vs. older versions

A distinction has to be made between operations that the supplier can perform on the current version (which can be edited) and any older version (which are read-only).

Provided all of the above authorizations are granted to the Supplier profile, if supplier access is allowed on the current version, the supplier may:

- Edit clauses already inserted in the document version
- Add new clauses (empty clauses only)
- View the document
- Use the Search feature
- Add comments to clauses
- Access clause histories and compare document versions (only versions made accessible to the supplier)
- Generate the contract in Word or PDF format

On older versions, the supplier can do all of the above, except add or edit clauses.

MANAGING CONTRACT ATTACHMENTS

Managing Contract Documents

Attaching a document to a contract

1. Open the contract.
2. Display the *Exhibits* tab.
3. Click the **Add document** button. The *Edition of content* window displays. It presents the list of available document types.
4. Click the document type you wish to create.

Non Disclosure

Document

Version : ⓘ

(en) ▾

(fr)

Title : (de)

(it)

(pl)

Summary :

Status : Draft

Attached files : ⓘ **Add Document**

Information

Contract

Horizon Master Agreement

Publish Delete Save as draft Save as draft and close Close

5. Specify the document's version number and title.
6. Click the **Add document** button placed next to the field *Attached files* in order to select the file to be attached.
7. Click the **Save as draft** button or the **Save as draft and close** button to save the document in the *Draft* status.
Click the **Publish** button to save the document in the *Validated* status and make it available for authorized users to view.

Contract: DELL France Frame Agreement

General information Contracting parties Dates Negotiated terms **Documents** Writing Items Order Assessment Validation

Add document

	Title ▾	Type ▾	Attachments	Author ▾	Modified on ▾	Created on ▾	End of validity ▾	Version
✕	NDA	Accord de confidentialité (Draft)		A DE	4/2/2012 7:15:43 PM	4/2/2012		1
✕	Terms & Conditions	Conditions générales (Validated)		A DE	4/2/2012 7:13:02 PM	4/2/2012		1
✕	Signed contract	Contrat principal (Validated)		A DE	4/2/2012 7:11:59 PM	4/2/2012		1

3 Result(s)

Tests v7.0 ©

Renew Create an amendment Save Create a new purchase requisition

Draft documents are highlighted in orange.

Generating a PDF of the *Authoring* tab's document and attaching it to the *Exhibits* tab

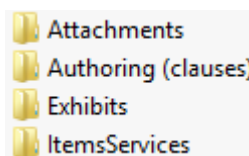
1. Click **Other actions** > **Generate the document**.
The *Add to documents* window will display.

2. Select the desired document version and select the type you want to tie it to (for instance, principal contract, contract amendment, contract exhibits).
3. Click **Save**.

The document will be created with an *Approved* status and added to the *Exhibits* tab. The label of the document version in the *Authoring* tab will be used as the title and version name of the newly created content.

Extracting all contract documents to a ZIP file

You can download to your computer a ZIP file containing all the contract's documents, organized into 4 folders:



- **Attachments:** files attached to the *Contract Header* tab
- **Authoring (clauses):** the various versions of the contract document created via the *Authoring* tab
- **Exhibits:** documents attached to the contract using the *Exhibits* tab
- **Items/Services:** Excel file with the list of items/services linked to the contract in the *Items/Services* tab

To download these documents, click **Other Actions** > **Extract all documents to Zip file**.

INTEGRATION WITH OTHER IVALUA BUYER MODULES

Procurement

Overview

Contract terms are seamlessly enforced throughout the procurement cycle thanks to the integration of the various modules involved.

Purchase requisitions are automatically sourced to existing contracts and negotiated prices are automatically implemented.

Catalog Items

Adding catalog items

Catalog items covered under a frame agreement can be created either:

- in the catalog, or
- in the Contract Record (*Items/Services* tab).

Each Price Sheet can be attached to a specific contract and each item listed in a contract is also automatically listed in the catalog.

Adding an item to a contract

1. Open the Contract.
2. Display the *Items/Services* tab (see page 17 for further information on why this tab may or may not be included in a contract).
3. Click the **Create/Add existing item** button. The *Creation/Edition of an item* window displays.

An Item (or Price Sheet) is always attached to a Product Sheet.

4. You may select an existing product or create a new one.

To attach a new item to an existing product:

- Click the **Selector** button  placed next to the field *Select an existing product*; in the window that displays, select the desired product by clicking its *Select* icon .
The selected product's sheet displays in the left part of the *Create item* page. The *Create/Modify price* window displays so that you may create a new Price Sheet and attach it to the selected product.
- Fill in the Price Sheet.
- Click the **Save** button.

To attach a new item to a new product:

- Fill in the product information that displays in the left part of the page *Create item*.
- Fill in the Price Sheet that displays in the right part.
- Click the **Save** button.

For further reference on Products, Price Sheets, and Items, refer to the User Manual - Catalog Module.

Purchase Requisitions

Creating purchase requisitions

Purchase requisitions can be created various ways, including from the catalog or from the contract

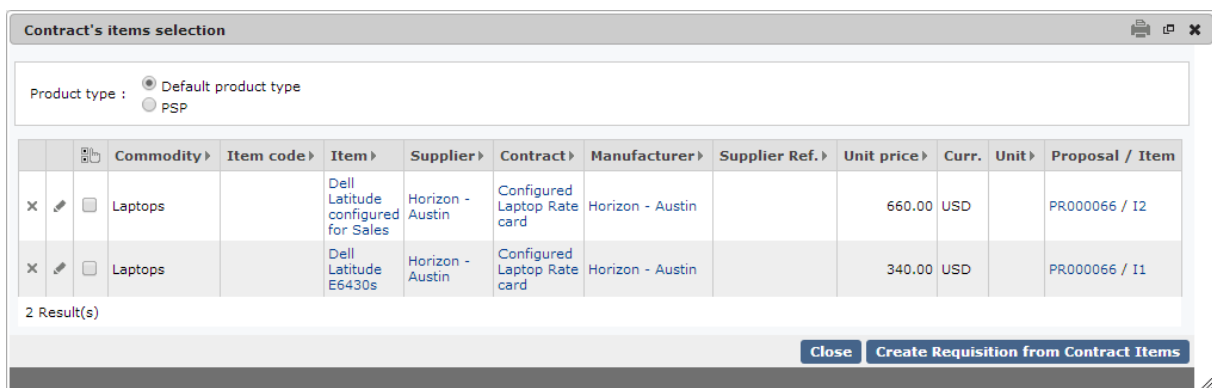
Creating a purchase requisition from a Frame Agreement

In a Frame Agreement, purchase requisition creation features become available when the 3 following conditions are met:

- The contract belongs to your organizational and purchase perimeter.
- You have been granted the necessary authorizations to create a purchase requisition (auth_req_create: [REQ] Create a purchase requisition).
- At least one item (Price Sheet) is attached to the contract.



To create a PR:

- Open the Contract.
- Display the *Items/Services* tab.
- Click the button **Other Actions > Create Requisition from Contract Items**.
The *Contract's items selection* window will display.



Contract's items selection

Product type : ☒ Default product type ☐ PSP

		Commodity ▶	Item code ▶	Item ▶	Supplier ▶	Contract ▶	Manufacturer ▶	Supplier Ref. ▶	Unit price ▶	Curr.	Unit ▶	Proposal / Item
X		Laptops		Dell Latitude configured for Sales	Horizon - Austin	Configured Laptop Rate card	Horizon - Austin		660.00	USD		PR000066 / 12
X		Laptops		Dell Latitude E6430s	Horizon - Austin	Configured Laptop Rate card	Horizon - Austin		340.00	USD		PR000066 / 11

2 Result(s)

Close **Create Requisition from Contract Items**

4. Specify whether you will order items (*Default product type*) or services (*PSP*).
5. Select the checkbox of items or services you want to include in your requisition.
6. Click the button **Create Requisition from Contract Items**.
The purchase requisition will display. It contains one line item per item selected. By default, the ordered quantity is set to 1.

Basket REQ000379 - Req. 7/29/2014 (Drafted)

✓ Data have been saved

Purchase requisition | Terms | Workflow

Requisition Name: Req. 7/29/2014
 Requestor: DE A
 Organization: 1030 - Research & development
 Cost center: 1030 - Research & development
 Project:

Requisition Number: REQ000379
 PR Type: Purchase
 Legal company:
 Open order: ☐

Alerts (0)
 Add alert:

Internal Notes

Internal Comments:
 File(s): en
 Add Document

Delivery address: 69 rue de Paris Orsay
 Invoicing address: 69 rue de Paris Orsay

Add an item | Delete Lines | Copy selected items | Edit Lines

	#	Label	Supplier	Quantity	Unit	Unit price	Total (tax excl.)	Currency	Deliv. date	Link to Sourcing
X	1	Dell Latitude configured for Sales	(Horizon - Austin) Horizon - Austin	1.00		660.00	660.00	USD	8/28/2014	


1 Result(s)

Estimated Value
 Amount (tax excl.): 660.00 USD
 Amount (tax incl.): 660.00 USD

Budgets
 0 Result(s)

<< Back to catalog | Other Actions | Save | Submit for Approval >> | Save and close | Close

7. For each line item:

- Click the *Edit* icon .
The line item details display.

Item

Line Information

Search Catalog/Contracts: Dell Latitude configured for Sales
 Description: Dell Latitude configured for Sales

Part Number:
 Contract Supplier: Horizon - Austin
 Order supplier: Horizon - Austin
 Supplier Contact:

Commodity: 1A3 - Laptops
 Contract: Configured Laptop Rate card

Features

Laptop Type:
☐ Engineer
☐ Sales
☐ Security
☐ Standard

Line Item Notes

Quantity: 1.00
 Price: 660.00
 % discount:
 Total After Discount (pretax): 660.00
 Tax:

Request date: 8/28/2014
 Shipping address: 69 rue de Paris Orsay
 69 rue de Paris
 91400 Orsay
 FRANCE

Comment:
 Attachment: en
 Add Document

Cost allocation information

Entry in: % Amount

To be allocated: 0%

Account	Cost Center	Organization	Project	Budget line	Fiscal Year	Deduc. %	Net of tax Amount (USD)	Budget
X 218300 - Matériel	1030 - Research &	bos - Boston		IT & Telecoms	2014 - IV	100.00 %	660.00	✓
X 601000 - Achats st	1030 - Research &	bos - Boston				%		✗

2 Result(s)

Terms

Reset | Save & new | Save | Save and close | Close

- Specify the desired quantity and delivery date.
- Make sure the *Order supplier* is correctly filled in.
- Select desired features and/or options if they are offered.

- Click the **Save & close** button.
8. Click the **Save** button in the purchase requisition page.

Orders

Viewing contract related orders and checking Ordered/Delivered/Invoiced amounts

Contract: FRDELL001 - DELL France Master Agreement

10 Req.

Contract Header

Team

Dates and Renewals

Negotiated terms

Exhibits

Authoring (clauses)

Items/Services

Lifecycle Workflow

Order

Contract Scorecard

Alerts	Purchase order ID	Supplier	Requisition	Requestor	Status	Currency	Ordered amount (tax excl.)	Delivered amount (tax excl.)	Invoiced amount (tax excl.)	Progress	Delay		PO
	PO313042	DELL FRANCE	PO consolidated	A DE	Ordered	EUR	4,583.00			Sent; Acknowledgement	124	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
	PO313039	DELL FRANCE	D.A. du 21/03/2014	A DE	Ordered	EUR	4,065.00	4,065.00	4,065.00	Acknowledged		<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
	PO313036	DELL FRANCE	PO consolidated	A DE	Ordered	EUR	3,014.00	3,014.00	3,014.00	Sent; Acknowledgement		<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>
	PO313034	DELL FRANCE	PO consolidated	A DE	Ordered	EUR	6,378.00			Sent; Acknowledgement	120	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>

4 Result(s)

Buyer demo v8.128

Save

Other Actions

The *Orders* tab in the Contract Record gives an overview of all orders placed on contract-related items.

They are listed here from their inception (*Initialized* status) and can be followed up until they are fully processed (receipt and invoice). As orders enter in the *Ordered* status, receipt and invoice creation features become available in the *Orders* tab.

As orders are being processed, the system will update the ordered, received, and invoiced amounts.

RFx

Automatically generating a contract awarded as the result of an RFx

When a contract is awarded as the result of an RFx, you may generate it directly from the sourcing project (*Award Bids* step).

Depending on the system setup (capability must be enabled via parameter `ctr_create_item_from_bpm`), contract items can be automatically created based on the awarded supplier's offer in response to the RFx. Items will be created using the code, label, description, unit of measure, and quantity associated with RFx items.

For further reference on RFx awards, please refer to the eSourcing User Manual.

Adding RFx proposal items/services to a contract

1. Open the Contract.
2. Display the *Items/Services* tab.
3. Click the Add Proposal Items button.
The window *Create/Update a contract from a proposal* will display.
4. By default, the current contract is selected as the contract to be updated, but you can change it to a different contract (including a new one).
5. Select the proposal you want to load items from.
All the proposal elements that can be added to the contract will be listed (RFx documents, proposal documents, proposal items and team members). An orange background indicates an element that is already part of the selected contract.
6. Select the checkbox of items/services you want to add to the contract.

Create / Update a contract from a proposal

Proposal : Réponse N° 1

Existing contract : DELL France Master Agreement

New contract

Orange: the articles (or document) already added to the selected contract

RFx documents to add

0 Result(s)

Proposal documents to add

0 Result(s)

Propose sub-items of awarded items : ☐

Proposal items to add

	Code	Group	Type code	Item	Order	Qty	Unit	Deliv. date	Unit price	Deliv. date	Amount	Contract / Item
<input checked="" type="checkbox"/>	2		Required Item	HP ENVY x2		50.00000	Each	3/21/2014 2:28:53 PM	600.00	3/10/2014	30,000.00	

1 Result(s)






Team members to add

Save Save and close Close

7. Click Save and close.


Suppliers

Viewing the contracts linked to a given supplier in the Supplier Record

Supplier: OFFICE DEPOT BS 13 Req.     

Identity Administrative Contacts Credentials Financial Analysis Services **Activity** Approvals Additional Information

▼ Sourcing processes

Code	Name	Manager	Steps
X  BPM000091	Office supplies	A DE	1 2 3 4 5 6 7 8 9

1 Result(s) >> view all

▼ Orders

0 Result(s) >> view all

▼ Exceptions

0 Result(s) >> view all



▼ Improvement Plan

0 Result(s) >> view all

▼ Strategic Action Plans











0 Result(s) >> view all

▼ Contracts


Code	Name	Type	Alert	Date Status	Evaluation
X  CTR000051	Contrat cadre OFFICE DEPOT	Master Agreement (buying)	EUR	Valid contract but progress status inactive	



1 Result(s) >> view all

▼ Products

Commodity	Item code	Item	Contract	Manufacturer	Supplier Ref.	Unit price	Curr.	Unit
X  Accessories and devices	AMB F3320	FAX RICOH 3320L (TYPE 2)	Contrat cadre OFFICE DEPOT	OFFICE DEPOT BS				Each
X  Accessories and devices	AMB F1140	FAX RICOH 1400L (TYPE 1)		OFFICE DEPOT BS		495.00	EUR	Each
X  Accessories and devices	AMB C50 LOC	AFICIO MPC 5000 RESEAU LOC 60 MOIS		OFFICE DEPOT BS		208.00	EUR	Day
X  Accessories and devices	AMB C40 INST RESEAU PROV	AF.MPC 4000 INSTAL CONNEX RESEAU PROVINCE		OFFICE DEPOT BS		750.00	EUR	Each
X  Accessories and devices	AMB C40 INST RESEAU RP	AF.MPC 4000 INSTAL CONNEXION RESEAU RP		OFFICE DEPOT BS		300.00	EUR	Each
X  Accessories and devices	AMB C40 MAJ RESEAU	AF.MPC 4000 MAJ CONNEXION RESEAU		OFFICE DEPOT BS		10.00	EUR	Day
X  Accessories and devices	AMB C40 COPC	AFICIO MPC 4000 COUT COPIE COULEUR		OFFICE DEPOT BS		0.07	EUR	Each
X  Accessories and devices	AMB C40 COP	AFICIO MPC 4000 COUT COPIE NOIR & BLANC		OFFICE DEPOT BS		0.01	EUR	Each
X  Accessories and devices	AMB C40 LOC	AFICIO MPC 4000 RESEAU LOC 60 MOIS		OFFICE DEPOT BS		147.00	EUR	Day
X  Accessories and devices	AMB C28 INST RESEAU PROV	AF.MPC 2800 INSTAL CONNEX RESEAU PROVINCE		OFFICE DEPOT BS		750.00	EUR	Each

48 Result(s) << Previous page 1 2 3 4 5 Next page >> >> view all

Buyer demo v8.128 

 Save  Finish

Contracts linked to a given supplier are listed in the *Activity* tab of the Supplier Record.

This tab is auto populated and is intended to present an overview of the supplier's activity with your company: contracts, orders, sourcing processes, catalog items, etc.

It offers quick access to the various listed resources. For each resource type, a *View all* link points to the resource dedicated search page, filtered on the current supplier.